Trading Terminal Version 2.0.2_20

User Manual – Getting Started

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About this Document

This document is about the features and functionality of Trading Terminal through which a user can place orders and view current market stats in real time. It intends to guide the user of the application about all views and windows available so that he/she can use it effectively. The document discusses different types of views available in the application as well as different customization options to customize these views according to user preferences.

Audience

As this document is all about the features and usage of online trading terminal, it is intended for all users of Online Trading.

Conventions

CONVENTION / STYLE	Purpose
Bold	Name of application objects, e.g. menus, screens, buttons etc.

Introduction

Trading Terminal is an online trading application that offers the ability to buy and sell shares and view real time stock information. Trading Terminal client is installed on the system. This client gets connected with the Trading Server. Trading Server has different components running. A main component is Message Server which is connected with a Trading Engine. Trading Engine is responsible for executing trades. Other server side components are Feed Server, Feed Reader, Sub Feed Server, FIX Gateway etc. These components are responsible for various server side operations. This manual covers client portion of the Terminal only. This Terminal (client) offers a variety of different useful menu options to facilitate sale/purchase and manage client information efficiently.

Trading Terminal provides following advanced features:

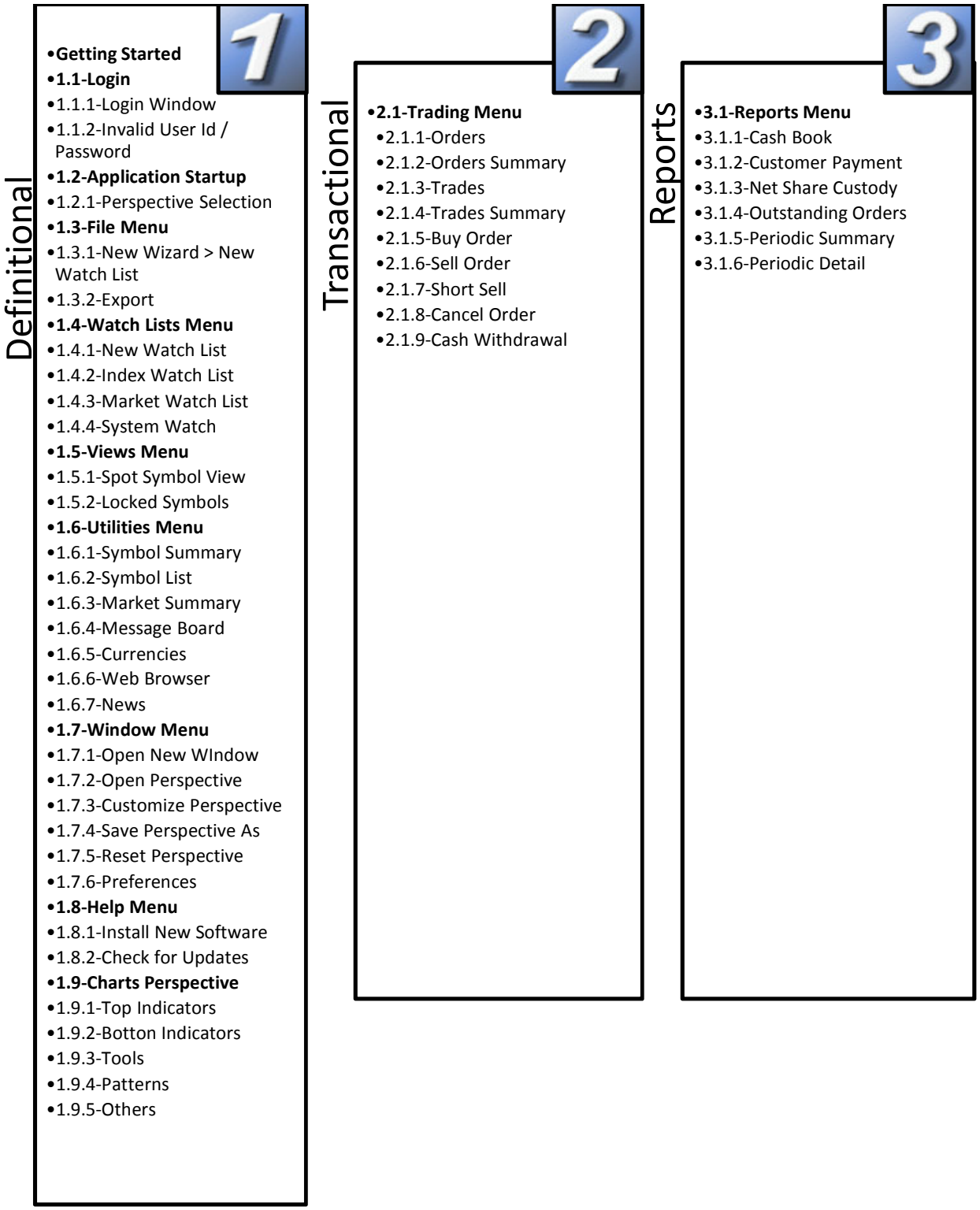
Different perspectives named Report, Charts, Research, Social and Trading are available which provide user interface for different views and operations.

All basic views and operations are available in Trading Perspective. In this perspective current market statistics for different stocks are available. This perspective also provides exchange metrics through a number of watch lists e.g. New Watch List, Index Watch List, Market Watch List etc. Order book and Trade log views are maintained which keep record of all pending orders and executed trades respectively. A file is also maintained keeping record of all of the current day trades. Buy, Sell orders can be placed and user can also cancel his/her pending orders. Client margin is checked in real time during order entry; taking into account the client's executed trades and pending orders. Client can view his/her current clearing and overall portfolio positions.

Charts perspective provides different stocks and exchange statistics. Advanced charting module is provided containing Symbol and Index graphs.

All of the views can be customized according to user preferences and the customizations persist even after exit from the application and are restored on start up.

Application Screens



1 Definitional

Getting Started:

Navigation:

Start Menu > Programs >KASB DIRECT Trading Terminal > Trading Terminal.lnk

By default, Trading Terminal is installed in Start Menu > Programs >KASB DIRECT Trading Terminal folder of start menu. Start Menu > Programs >KASB DIRECT Trading Terminal > config.ini file contains some configuration parameters that are appropriate when application is installed.These can be modified later if required.

On start up, Terminal gets connected with the Trading Server. In case, if it fails to connect with the Server, following message appears. The connection may fail due to having temporary Server shutdown or some communication channel failures.

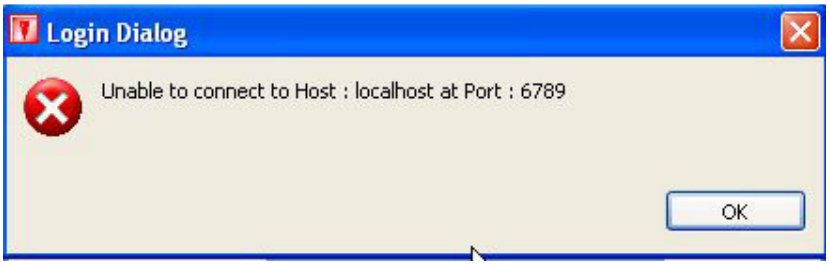


Figure 1: Connection Failed

1.1 Login

1.1.1 Login – Login Window

Navigation:

Start Menu > Programs >KASB DIRECT Trading Terminal > Trading Terminal.lnk

Each application user is provided with a unique user name and password. Each user has a particular user type that determines the level of access a user has to the application. There are three types of users:

Trader has full access to all of the views (except Portfolio View) and can place orders on behalf of different clients associated with the trader.

Client also has full access to all of the views (including Portfolio View) but can place orders on behalf of him/her only.

Subscriber has limited access to the application. Order related views and functionality is not available for this type of user while all other views are available.

For application login,

Login – Login Window (cont.)

Enter user ID in the User Id field.

Enter password in the Password field.

Press the ENTER key or click OK button.

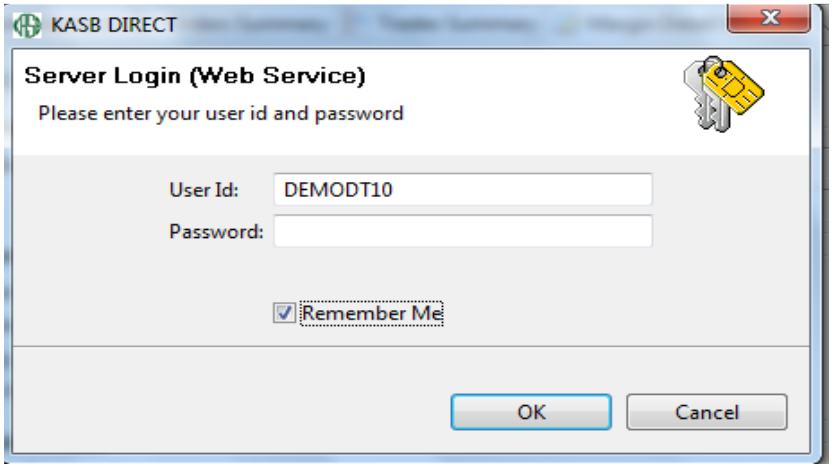


Figure 2: Login Window

Screen Explanation

Field	Function
User Id	User Id of the user
Password	Password of the user
Remember Me	If checked saved User ID for next logon

1.1.2 Invalid User Id / Password

Navigation

Start Menu >Start Menu > Programs >KASB DIRECT Trading Terminal > Trading Terminal.lnk

Give user name and password. Invalid user id of password screen is displayed in case of invalid user id or password.

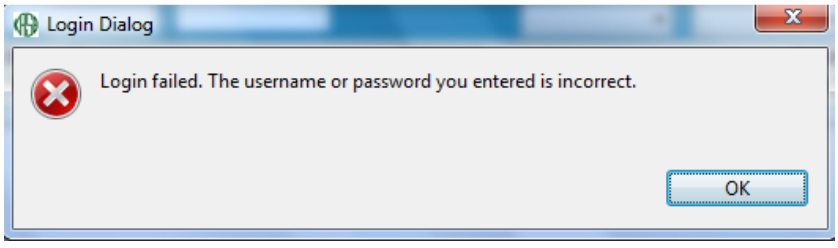


Figure 3: Invalid User Id or Password

1.2 Application Startup

Navigation:

Start Menu > Programs >KASB DIRECT Trading Terminal > Trading Terminal.lnk

Give valid user id and password. On successful logon this screen is displayed.

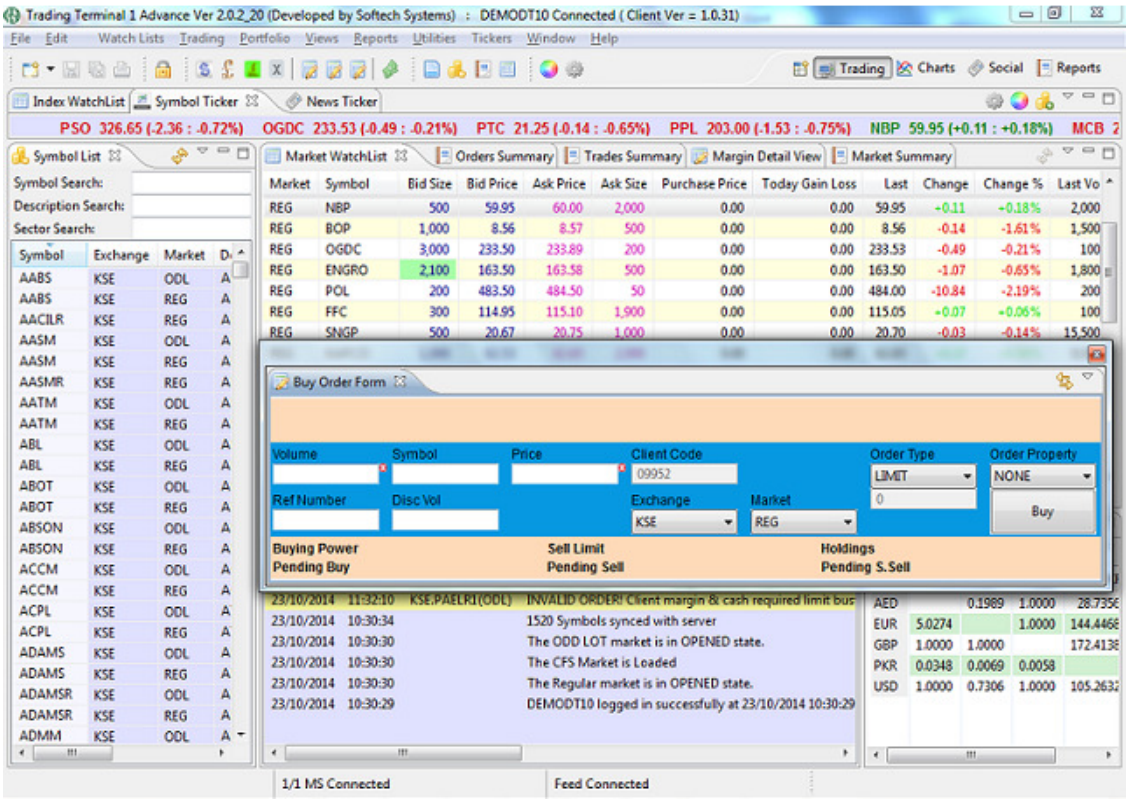

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Index WatchList Symbol Ticker News Ticker
PSO 326.65 (-2.36 : -0.72%) OGDC 233.53 (-0.49 : -0.21%) PTC 21.25 (-0.14 : -0.65%) PPL 203.00 (-1.53 : -0.75%) NBP 59.95 (+0.11 : +0.18%) MCB
Symbol List
Symbol Search:
Description Search:
Sector Search:
Symbol Exchange Market
Market WatchList Orders Summary Trades Summary Margin Detail View Market Summary
Market Symbol Bid Size Bid Price Ask Price Ask Size Purchase Price Today Gain Loss Last Change Change % Last Vo
Buy Order Form
Volume Symbol Price Client Code Order Type Order Property
Ref Number Disc Vol Exchange Market
Buy
Buying Power Sell Limit Holdings
Pending Buy Pending Sell Pending S.Sell
23/10/2014 10:30:34 1520 Symbols synced with server
23/10/2014 10:30:30 The ODD LOT market is in OPENED state.
23/10/2014 10:30:30 The CFS Market is Loaded
23/10/2014 10:30:30 The Regular market is in OPENED state.
23/10/2014 10:30:29 DEMODT10 logged in successfully at 23/10/2014 10:30:29
1/1 MS Connected
Feed Connected

Figure 4: Terminal screen on successful logon

1.2.1 Application Startup – Perspective Selection

Navigation:

Start Menu > Programs >KASB DIRECT Trading Terminal > Trading Terminal.lnk

Give user id and password. On successful logon,terminal screen appears.

Click on the icon encircled in red in the figure 4, select other and the select Trading Perspective from the popup window.

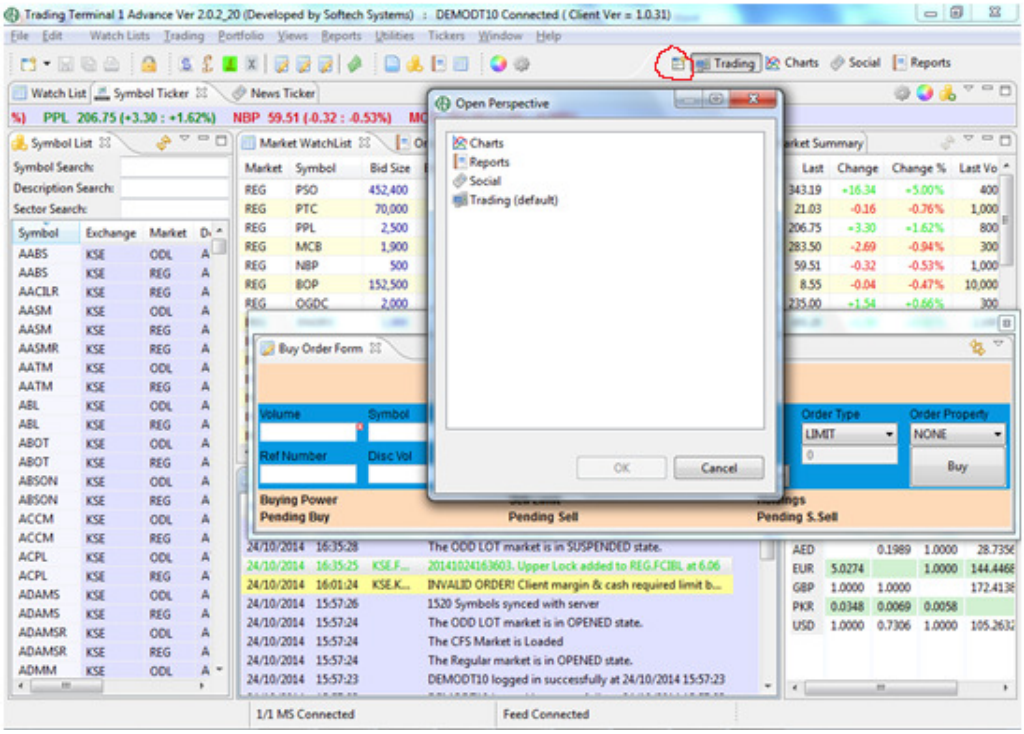


Figure 5: Selecting Trading Perspective

Application Startup – Perspective Selection (cont.)

Following screen appears.

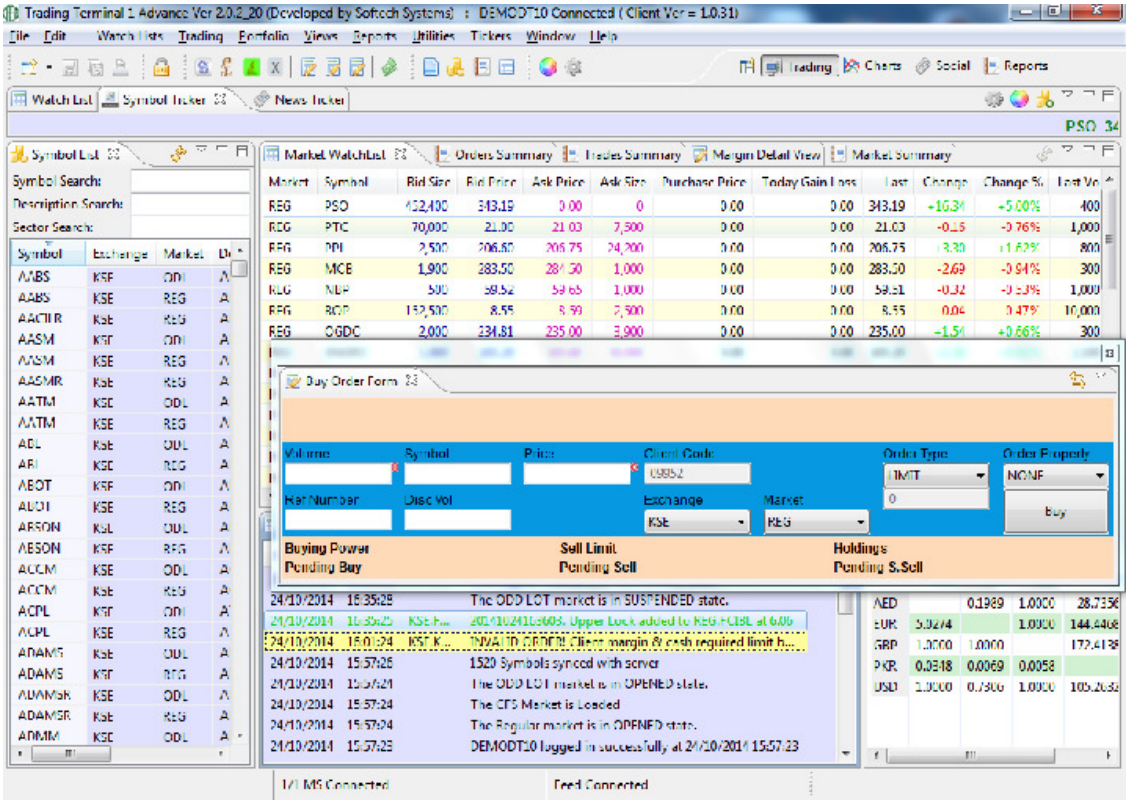

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Watch List Symbol Ticker News Ticker
Symbol List
Symbol Search:
Description Search:
Sector Search:
Symbol Exchange Market
Market WatchList Orders Summary Trades Summary Margin Detail View Market Summary
Market Symbol Bid Size Bid Price Ask Price Ask Size Purchase Price Today Gain Loss Last Change Change % Last Vo
Buy Order Form
Volume Symbol Price Client Code Order Type Order Property
Ref Number Disc Vol Exchange Market
KSE REG
Buy
Buying Power
Pending Buy
Sell Limit
Pending Sell
Holdings
Pending S.Sell
24/10/2014 15:57:26 1520 Symbols synced with server
24/10/2014 15:57:24 The CFS Market is Loaded
24/10/2014 15:57:24 The Regular market is in OPENED state.
24/10/2014 15:57:23 DEMODT10 logged in successfully at 24/10/2014 15:57:23
AED EUR GBP PKR USD
I/T MS Connected
Feed Connected

Figure 6: Trading Perspective

1.3 File Menu

1.3.1File Menu - New Wizard – New Watch List Wizard

Navigation:

File > New Wizard >Others

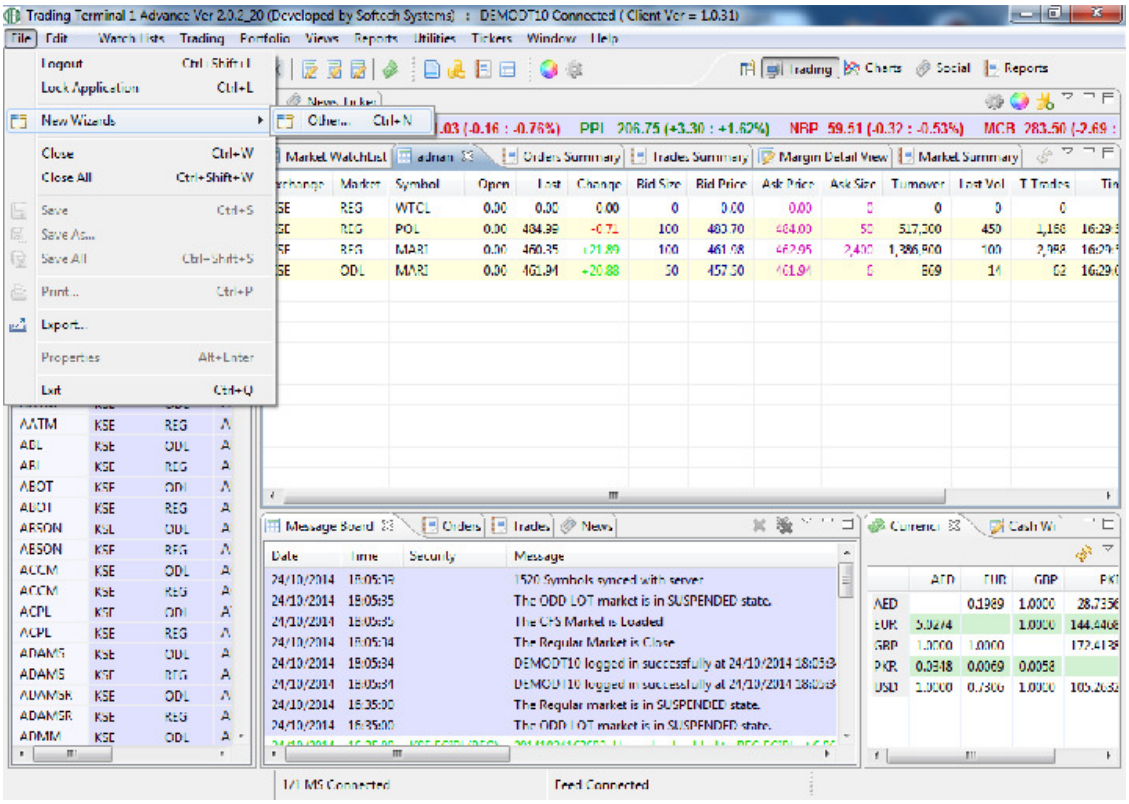


Figure 7: New Watch List Wizard

File Menu - New Wizard – New Watch List (cont.)

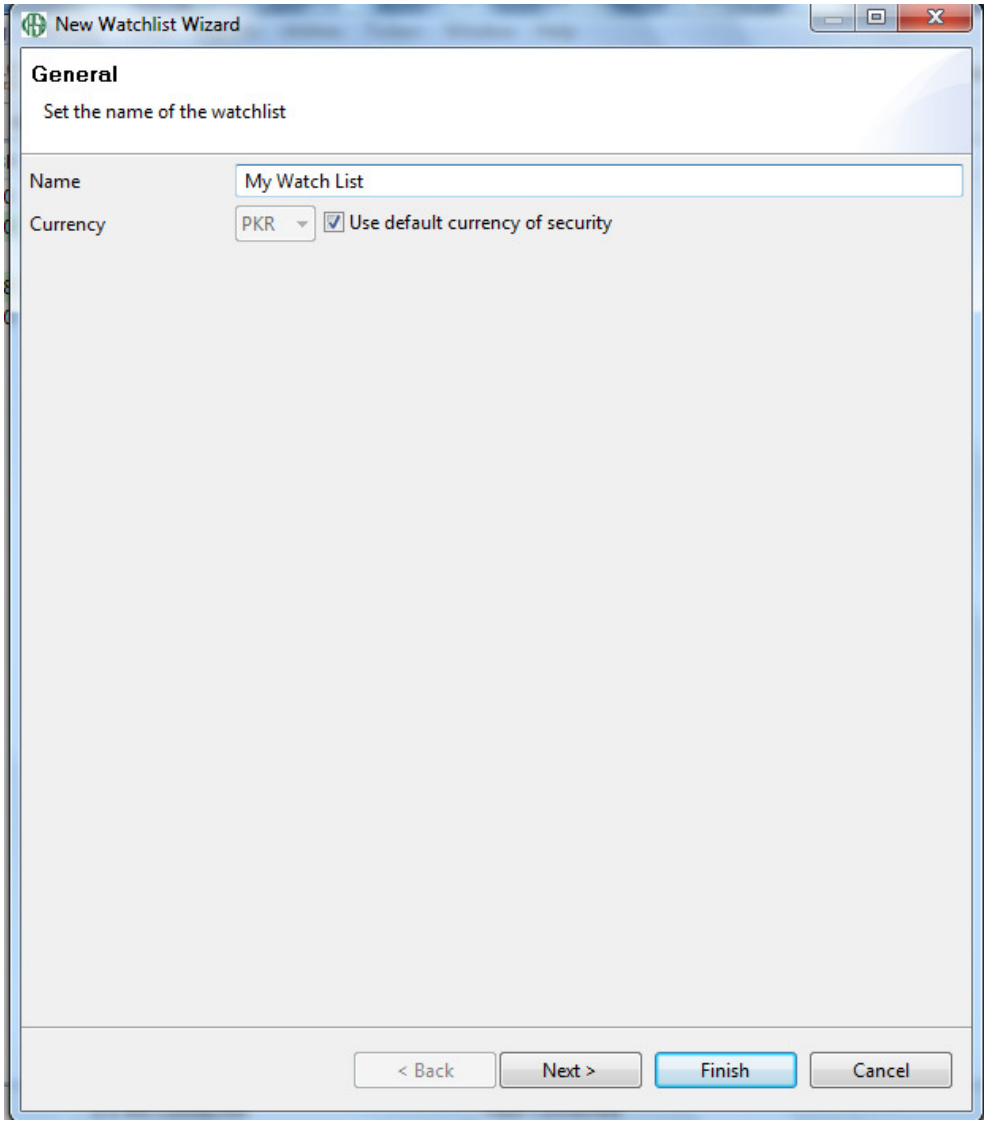


Figure 8: New Watch List Wizard – Name and Currency

Screen Explanation

Field	Function
Name	Name of the Watch List
Currency	Currency to be used in the Watch List
Use default currency for security checkbox	Check this checkbox to use the default currency of the security.

File Menu - New Wizard – New Watch List (cont.)

Select the column(s) from the Available columns and press the arrow key encircled in the figure. You can also press the button below the encircled button to select all columns. You can also re-order the shown columns by pressing the buttons after shown column list.

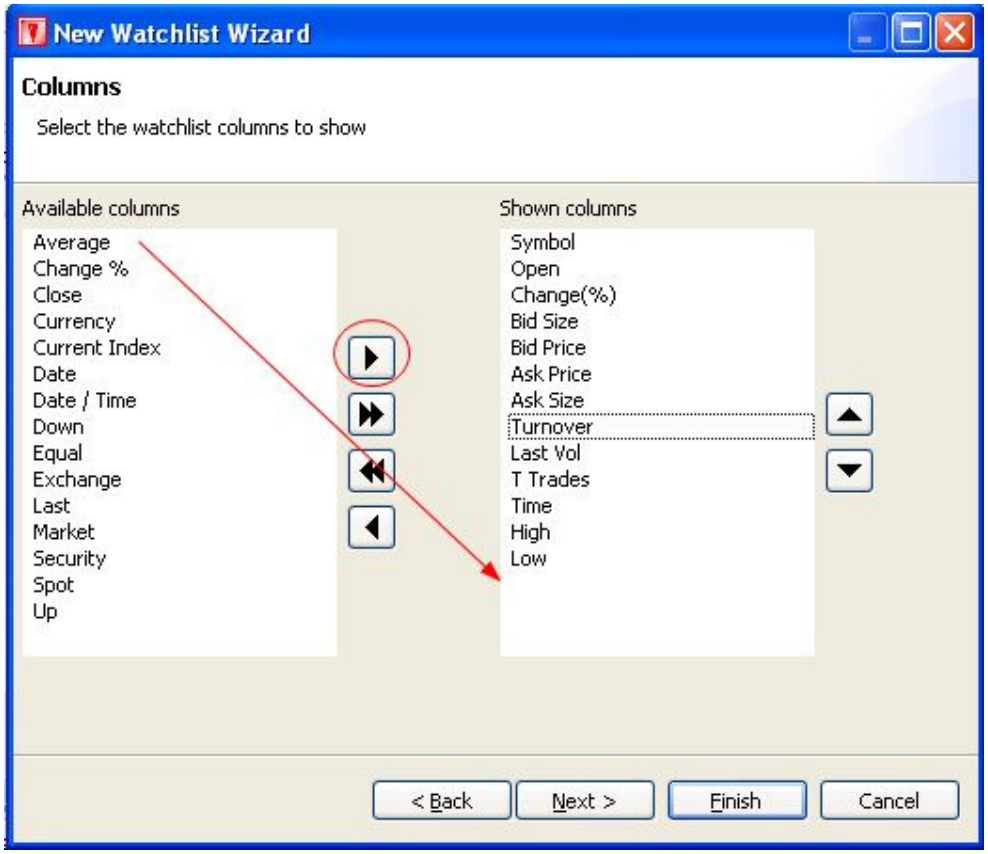


Figure 9: New Watch List Wizard – Selecting Columns

Screen Explanation

Field	Function
Available columns	Columns to be selected.
Shown columns	Selected columns to be displayed with the securities in the Watch List

File Menu - New Wizard – New Watch List (cont.)

Screen mentioned in the figure 9 appears. Select the security (ies) from the available list of securities and press the arrow button encircled in red. You can also re-order the securities by pressing up and down button displayed on the right of shown securities list.

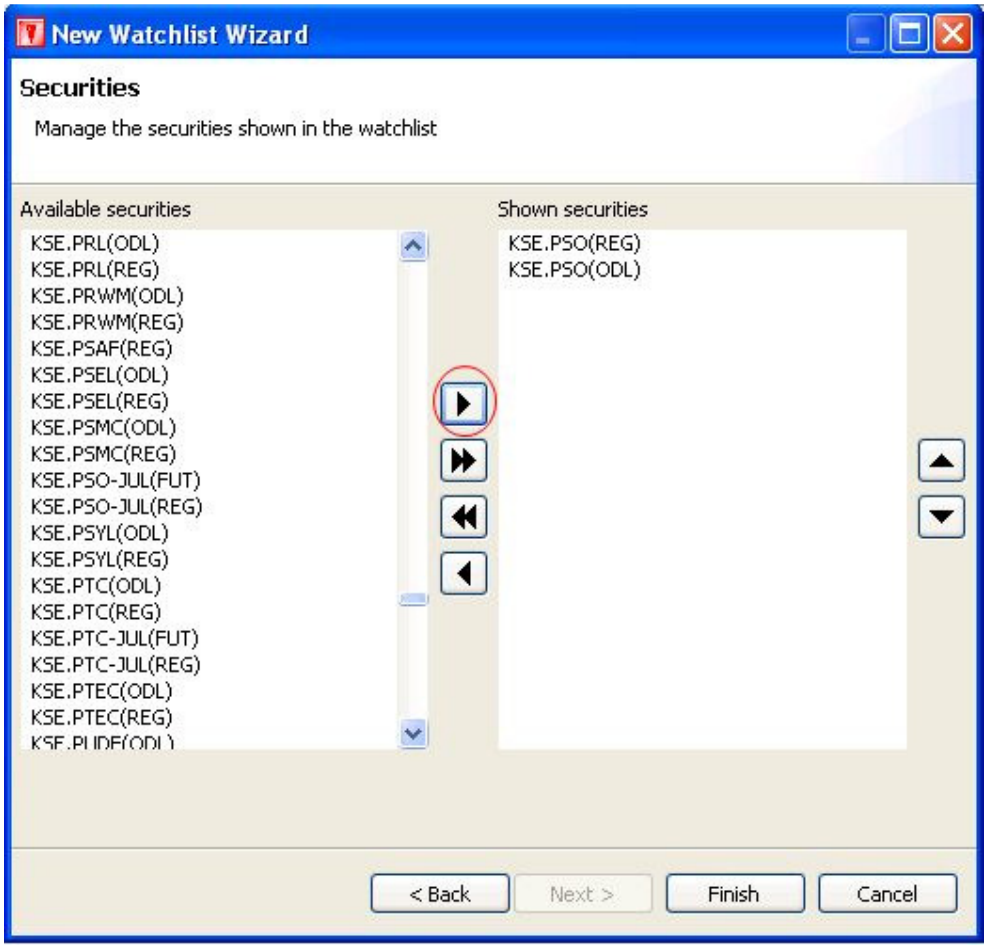


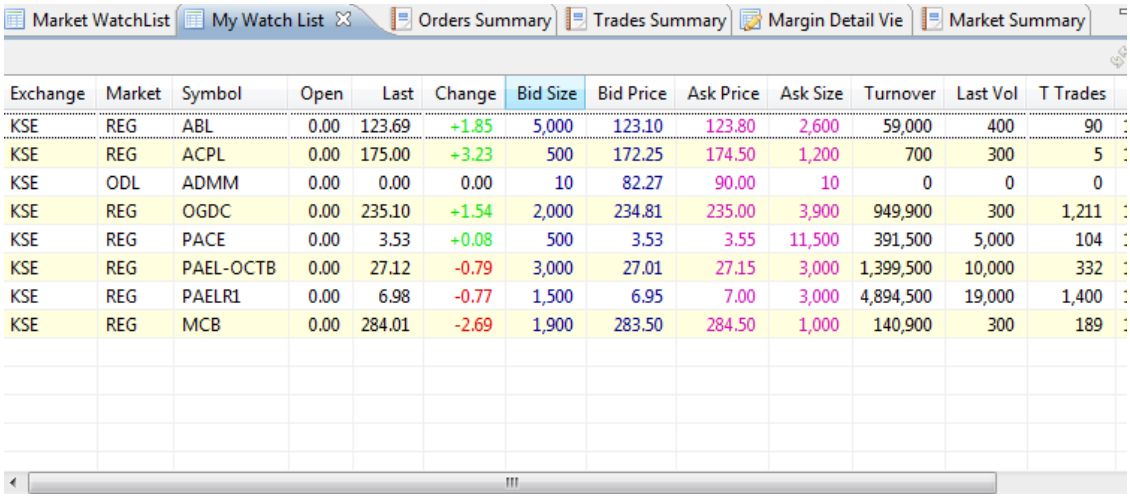
Figure 10: New Watch List Wizard – Selecting Symbols

Screen Explanation

Field	Function
Available securities	Securities to be selected.
Shown securities	Select securities to be displayed in the Watch List.

Press Finish button after selecting the securities. Screen mentioned in the next figure appears.

File Menu - New Wizard – New Watch List (cont.)



Exchange	Market	Symbol	Open	Last	Change	Bid Size	Bid Price	Ask Price	Ask Size	Turnover	Last Vol	T Trades
KSE	REG	ABL	0.00	123.69	+1.85	5,000	123.10	123.80	2,600	59,000	400	90
KSE	REG	ACPL	0.00	175.00	+3.23	500	172.25	174.50	1,200	700	300	5
KSE	ODL	ADMM	0.00	0.00	0.00	10	82.27	90.00	10	0	0	0
KSE	REG	OGDC	0.00	235.10	+1.54	2,000	234.81	235.00	3,900	949,900	300	1,211
KSE	REG	PACE	0.00	3.53	+0.08	500	3.53	3.55	11,500	391,500	5,000	104
KSE	REG	PAEL-OCTB	0.00	27.12	-0.79	3,000	27.01	27.15	3,000	1,399,500	10,000	332
KSE	REG	PAELR1	0.00	6.98	-0.77	1,500	6.95	7.00	3,000	4,894,500	19,000	1,400
KSE	REG	MCB	0.00	284.01	-2.69	1,900	283.50	284.50	1,000	140,900	300	189

Figure 11: My Watch List

1.3.2 File Menu – Export

Navigation:

File > Export

This option exports the chart data or Trade log on to a specified file.

Following popup dialog appears.

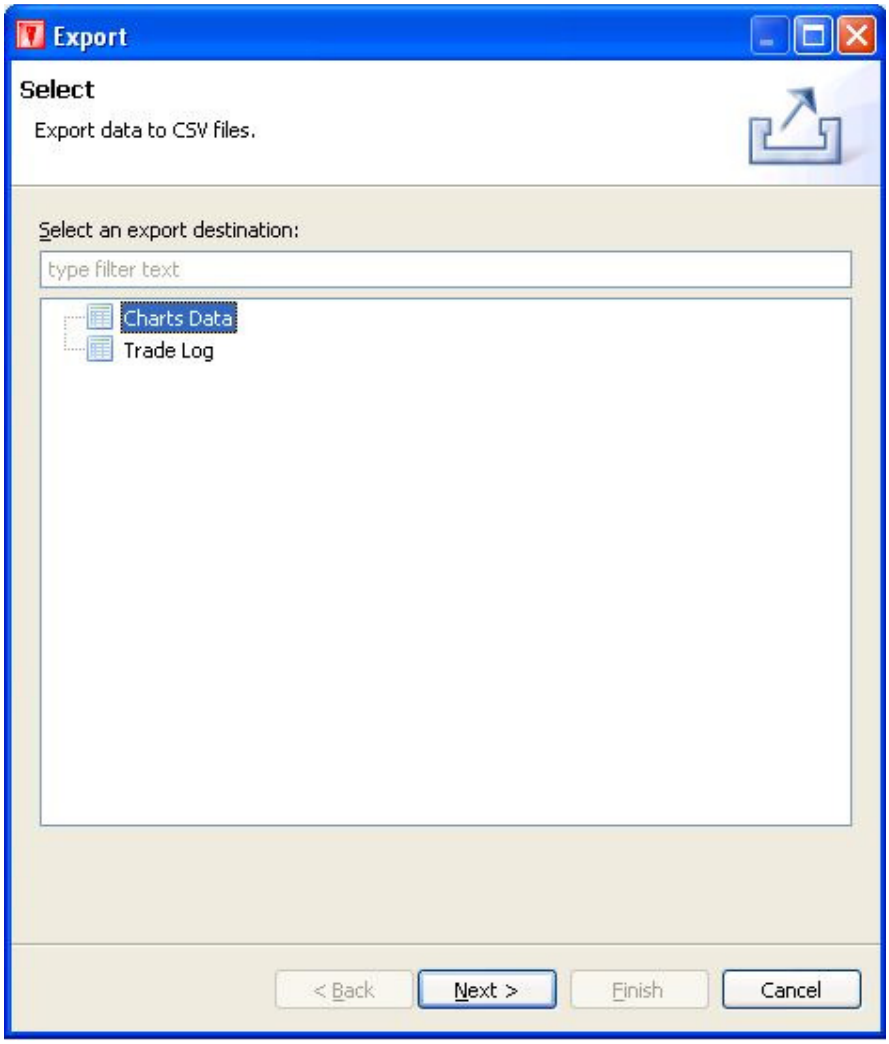


Figure 12: Export Dialog

To export charts data click on Charts Data in the dialog. Click next.

File Menu – Export (cont.)

Following screen appears

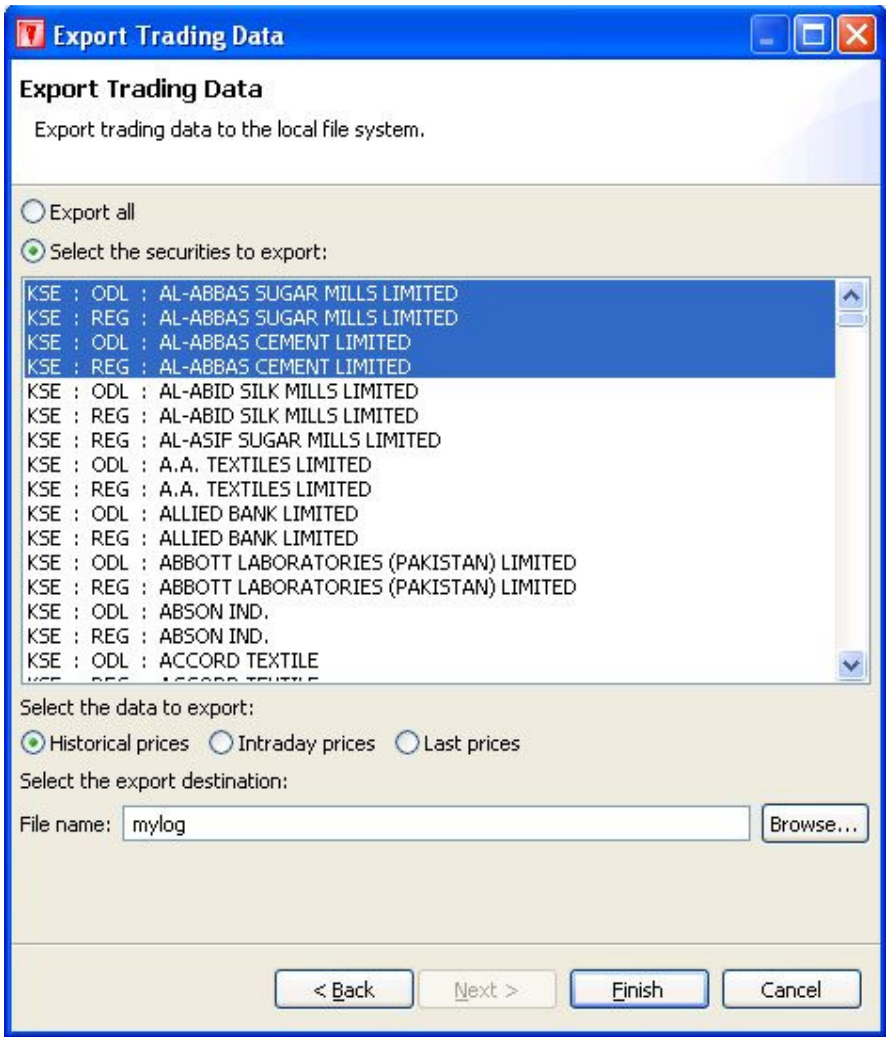

Export Trading Data
Export Trading Data
Export trading data to the local file system.
Export all
Select the securities to export:
KSE : ODL : AL-ABBAS SUGAR MILLS LIMITED
KSE : REG : AL-ABBAS SUGAR MILLS LIMITED
KSE : ODL : AL-ABBAS CEMENT LIMITED
KSE : REG : AL-ABBAS CEMENT LIMITED
KSE : ODL : AL-ABID SILK MILLS LIMITED
KSE : REG : AL-ABID SILK MILLS LIMITED
KSE : REG : AL-ASIF SUGAR MILLS LIMITED
KSE : ODL : A.A. TEXTILES LIMITED
KSE : REG : A.A. TEXTILES LIMITED
KSE : ODL : ALLIED BANK LIMITED
KSE : REG : ALLIED BANK LIMITED
KSE : ODL : ABBOTT LABORATORIES (PAKISTAN) LIMITED
KSE : REG : ABBOTT LABORATORIES (PAKISTAN) LIMITED
KSE : ODL : ABSON IND.
KSE : REG : ABSON IND.
KSE : ODL : ACCORD TEXTILE
Select the data to export:
Historical prices
Intraday prices
Last prices
Select the export destination:
File name:
mylog
Browse...
< Back
Next >
Finish
Cancel

Figure 13: Export Dialog

Click on “Export all”combo box to export all securities. To export a selected list of securities, select “Select the securities to export”. Highlight the securities to export. For historical prices select “Historical prices” combo, whereas select “Intraday prices” to select intraday price, whereas select “Last prices” to select last prices. Click browse specify location and give the filename. Click finish. Open the exported file to check the data.

File Menu – Export (cont.)

To export Trade Log select “Trade Log” from the export dialog. Click Next.

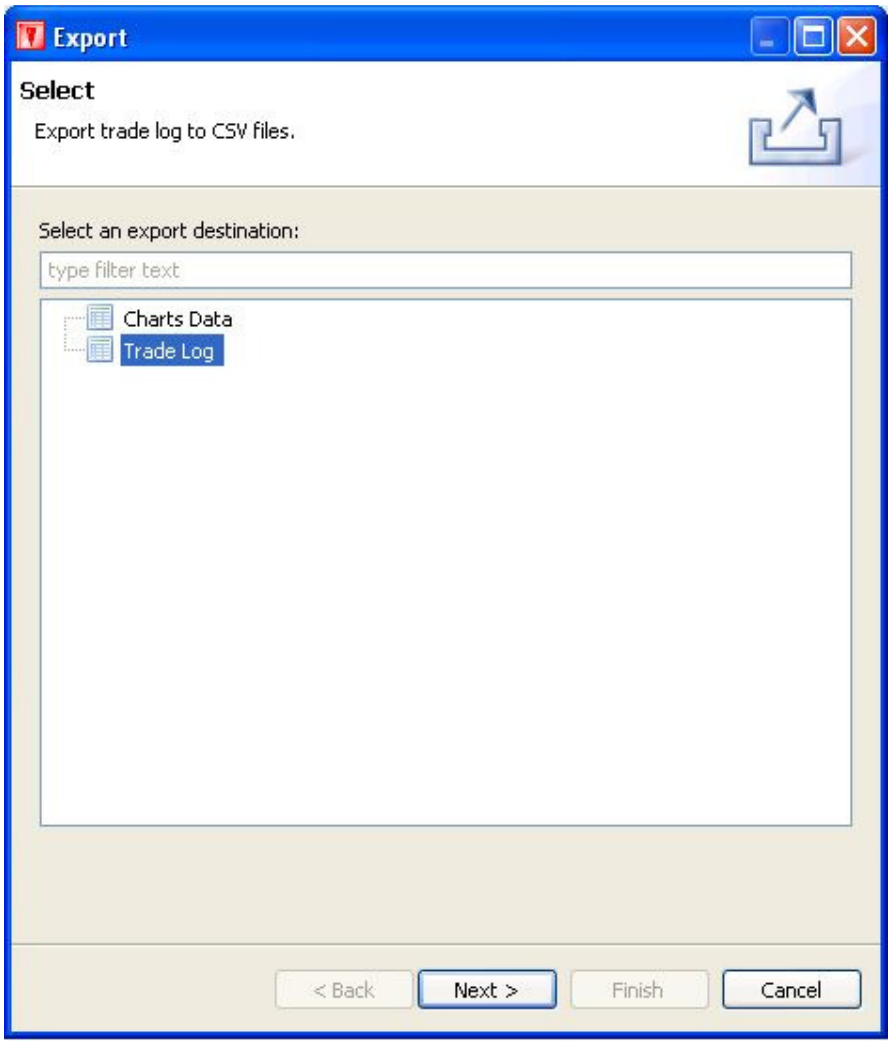


Figure 14: Export Dialog

File Menu – Export (cont.)

Following screen appears.

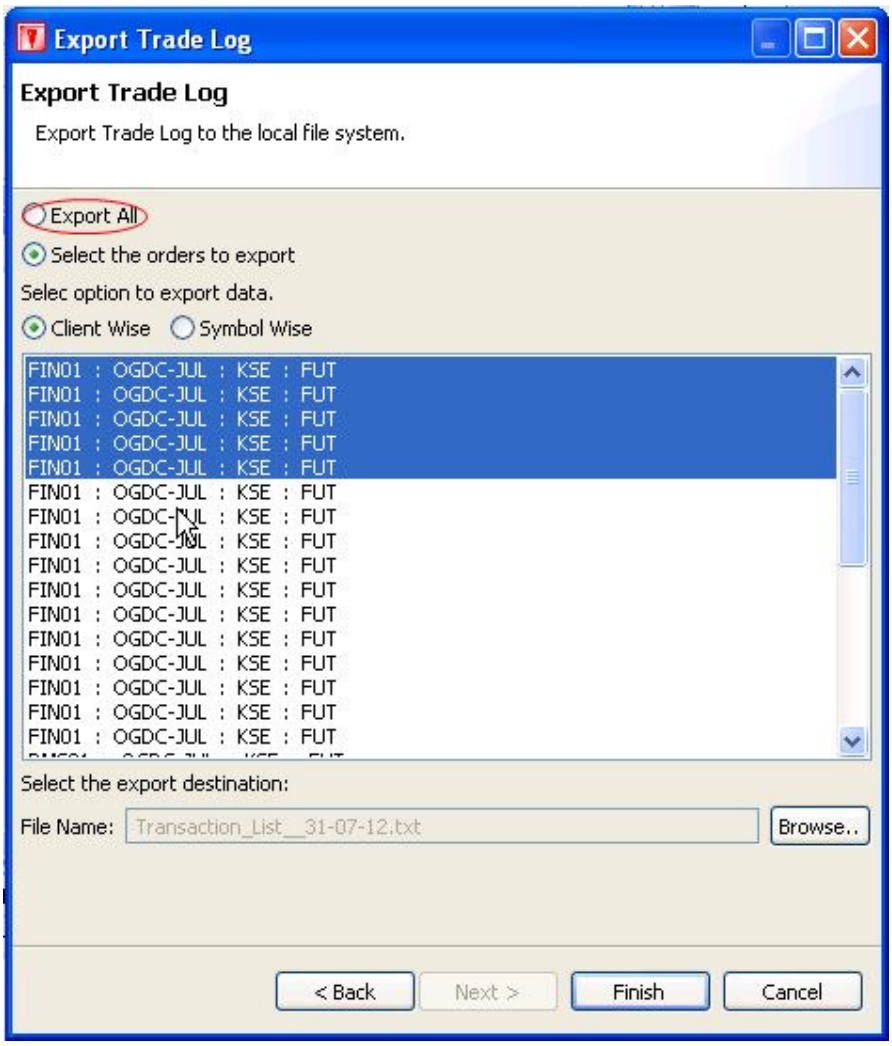


Figure 15: Export Dialog

Select “Export All” encircled in red to export all securities. Whereas to export selected orders select “Select the orders to export”. Highlight the orders to export. Select option to export data i.e. “Client Wise” or “Symbol Wise”. Click on browse and give the filename. Click finish to export the log.

1.4 Edit Menu

Edit Menu contains the Option to Change Password and Pin code for the user. There are others option like Cut, Copy, Paste, delete and setting also available. User can either access through Edit menu or through Short Keys.

1.4.1 CHANGE PASSWORD:

Navigation: Edit >>Change Password

KASB DIRECT User Terminal has provided with the facility to change Password as per the user discretion. Short Cut key is **Ctrl + Alt+ P** for change password request.

Please Follow the Screen

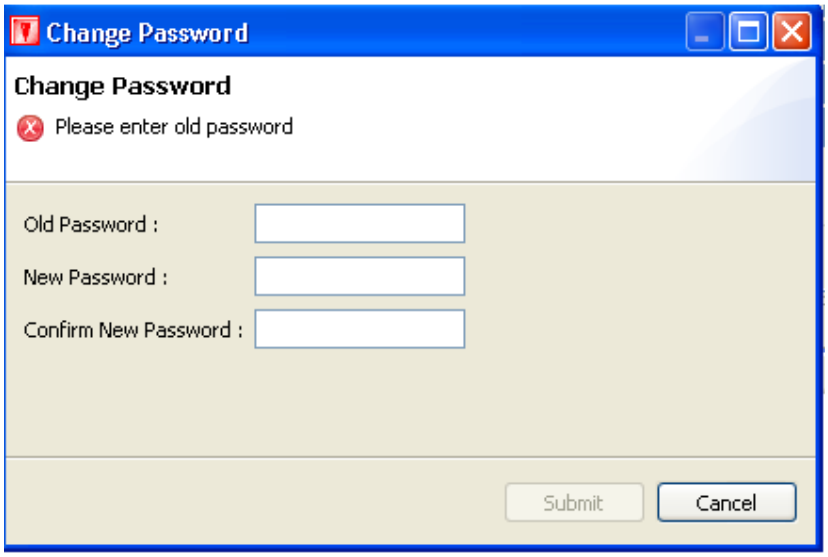


Figure 16: Change Password

Field	Function
Old Password	Enter the Old Password
New Pass word	Enter new password
Confirm New Password	Enter new password. It should be same. If enter wrong mismatched error will appear

1.4.2 Change PIN CODE:

Navigation:

Edit >>Change Pin Code

Change of PIN Code option also available along with the Password Change Option. Ctrl + Shift + P short cut available for pin code change.

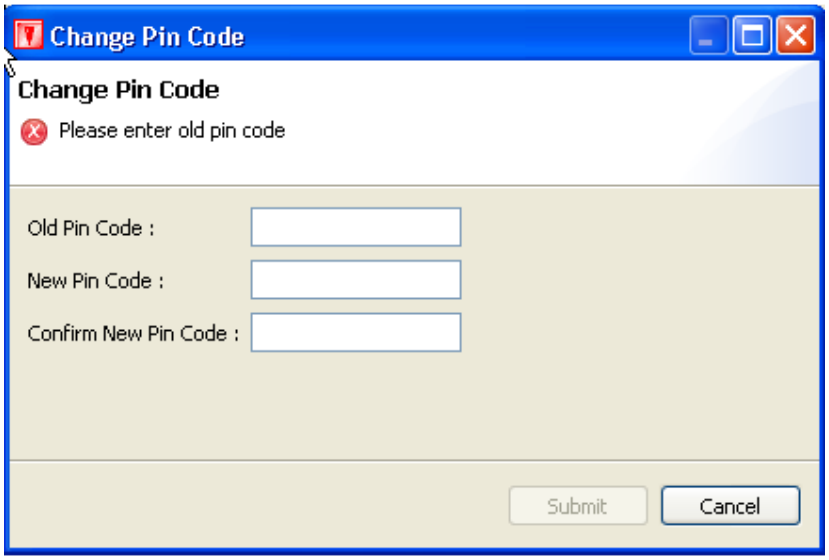


Figure 17: Change Pin Code

Field	Function
Old Password	Enter the Old Password
New Pass word	Enter new password
Confirm New Password	Enter new password. It should be same. If enter wrong mismatched error will appear

1.5Watch Lists Menu

Most of the Watch Lists are stock feed based and have similar customization options. User can choose symbols to be shown in the Watch List. User can select different columns to be shown on the Watch List from a list of columns and can also arrange these columns in some desired order. User's current settings for different view attributes, layout and positioning are saved on application exit and persist even after application has been closed. These settings are restored next time application is started.

Market	Symbol	Bid Size	Bid Price	Ask Price	Ask Size	Purchase Price	Today Gain Loss	Last	Change	Change %	Last
REG	PSO	452,400	343.19	0.00	0	0.00	0.00	343.19	+16.34	+5.00%	
REG	PTC	70,000	21.00	21.03	7,500	0.00	0.00	21.01	-0.16	-0.76%	1,
REG	PPL	2,500	206.60	206.75	24,200	0.00	0.00	206.85	+3.30	+1.62%	
REG	MCB	1,900	283.50	284.50	1,000	0.00	0.00	284.01	-2.69	-0.94%	
REG	NBP	500	59.52	59.65	1,000	0.00	0.00	59.69	-0.32	-0.53%	1,
REG	BOP	152,500	8.55	8.59	2,500	0.00	0.00	8.56	-0.04	-0.47%	10,
REG	OGDC	2,000	234.81	235.00	3,900	0.00	0.00	235.10	+1.54	+0.66%	
REG	ENGRO	1,900	165.20	165.80	30,000	0.00	0.00	165.19	+1.50	+0.92%	2,
REG	POL	100	483.70	484.00	50	0.00	0.00	484.99	-0.71	-0.15%	
REG	FFC	19,800	116.25	116.30	600	0.00	0.00	116.00	+1.14	+0.99%	
REG	SNGP	1,000	20.75	20.85	500	0.00	0.00	20.76	+0.18	+0.87%	
REG	KAPCO	500	63.01	63.29	2,500	0.00	0.00	62.99	+0.32	+0.51%	
REG	MRNS	100	111.01	113.40	200	0.00	0.00	112.73	-2.94	-2.54%	

Figure 18: Watch Lists Menu

1.5.1 Watch Lists Menu – New Watch List

Navigation:

Watch Lists Menu > New Watch List

New watch list is same as File > New Wizard > New Watch List. For details refer to File Menu - New Wizard – New Watch List. Details are explained in 1.3.1.

1.5.2Watch Lists Menu – Index Watch List

Navigation:

Watch Lists Menu >Index Watch List

Drag and drop securities from the Market Watch List onto the Watch List.

Indexed values are displayed with the securities along with the change percentage.

1.5.3Watch Lists Menu – Market Watch List

Navigation:

Watch Lists Menu > Market Watch List

Drag and drop the securities from the Securities view onto the Market Watch List.

Symbol	Last	Change(%)	Bid Size	Bid Price	Ask Price	Ask Size	Turnover	Last Vol	T Trades	Time
PSO	252.50	-0.39 (-0.15%)	200	252.00	252.50	2,877	2,704	123	14	09:42:59
PTC	11.61	-0.04 (-0.34%)	400	11.61	11.69	100	18,100	500	4	09:38:41
PPL	181.75	+0.93 (+0.51...	10,000	181.75	181.99	8,000	272,656	353	705	12:11:11
MCB	169.65	+0.23 (+0.14...	1,600	169.55	169.65	50	50,556	450	90	09:41:29
OGDC	150.35	-1.52 (-1.00%)	10,000	150.01	150.35	9,000	98,448	1	504	12:09:47

Figure 19: Market Watch List

Details are displayed on the Market Watch List.

1.6 Views Menu

1.6.1 Views Menu - Spot Symbols View

Navigation:

Views > Spot Symbols

Spotted symbols are displayed in this view.

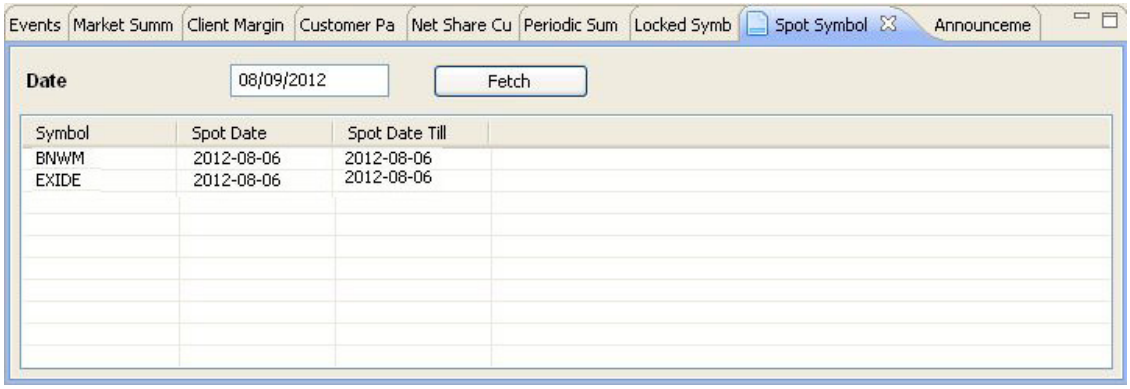


Figure 20: Spot Symbols View

Screen Explanation

Field	Function
Date	Date on which symbols are spotted

1.6.2Views Menu – Locked Symbol View

Navigation:

Views > Locked Symbols

Locked Symbols View displays upper and lower locked symbols.

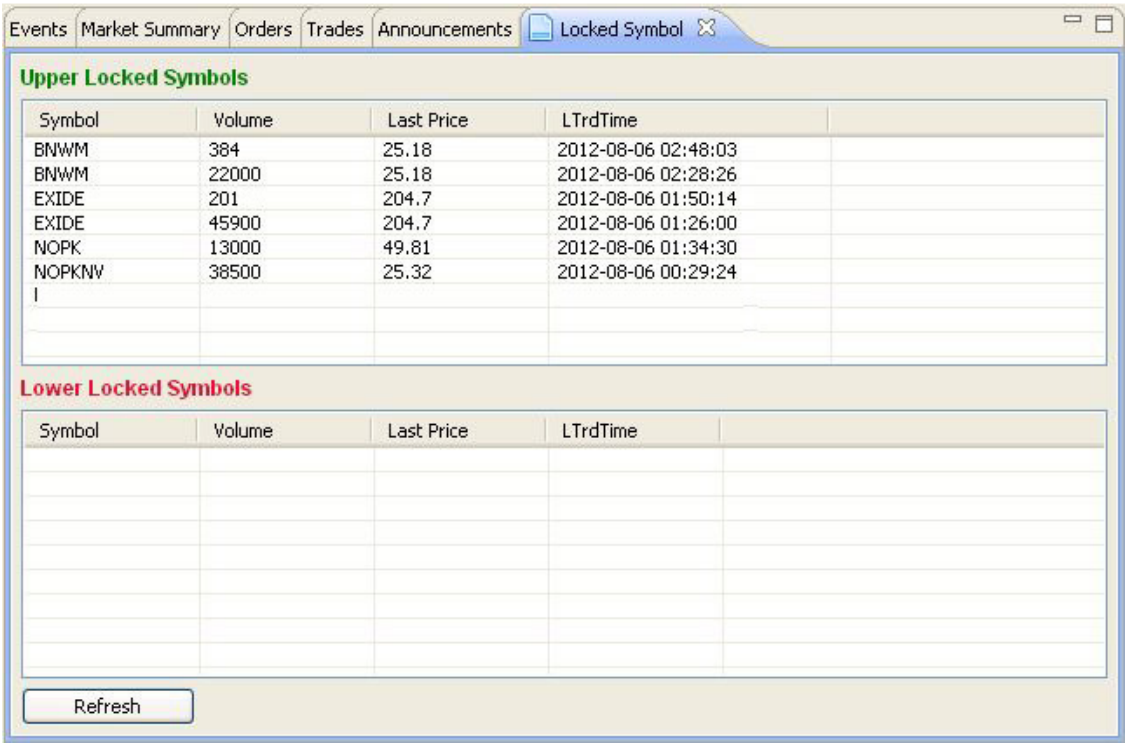


Figure 21: Locked Symbols View

1.7 Utilities Menu

1.7.1 Utilities Menu – Symbol Summary

Navigation:

Utilities > Symbol Summary

or

Securities View > Right Click Symbol > Symbol Summary

Symbol Summary displays the symbol for the selected symbol. It includes exchange, symbol, market, description, open price, last trade price, change, PreviousClose, high, low, total trades, turnover, market value, volume, from date, to date, spot, order limits and buy and sell.

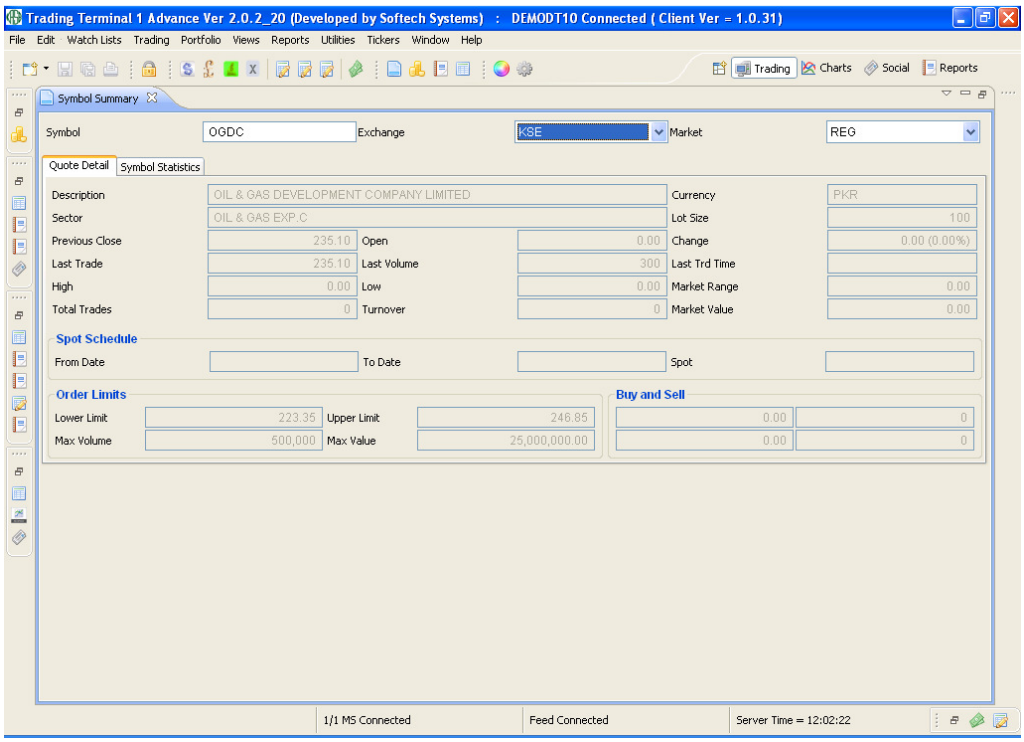

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Symbol Summary
Symbol OGDC Exchange KSE Market REG
Quote Detail Symbol Statistics
Description OIL & GAS DEVELOPMENT COMPANY LIMITED Currency PKR
Sector OIL & GAS EXP.C Lot Size 100
Previous Close 235.10 Open 0.00 Change 0.00 (0.00%)
Last Trade 235.10 Last Volume 300 Last Trd Time
High 0.00 Low 0.00 Market Range 0.00
Total Trades 0 Turnover 0 Market Value 0.00
Spot Schedule
From Date To Date Spot
Order Limits
Lower Limit 223.35 Upper Limit 246.85
Max Volume 500,000 Max Value 25,000,000.00
Buy and Sell
0.00 0
0.00 0
1/1 MS Connected
Feed Connected
Server Time = 12:02:22

Figure 22: Symbol Summary

1.7.2 Utilities Menu – Symbol List

Navigation:

Utilities > Symbol List (F3)

Symbol List view displays the list of securities in the stock exchange. In this view symbol, exchange, market, description and currency and displayed. Select the symbol, drag it and drop it onto the Watch List to see the detailed statistics.

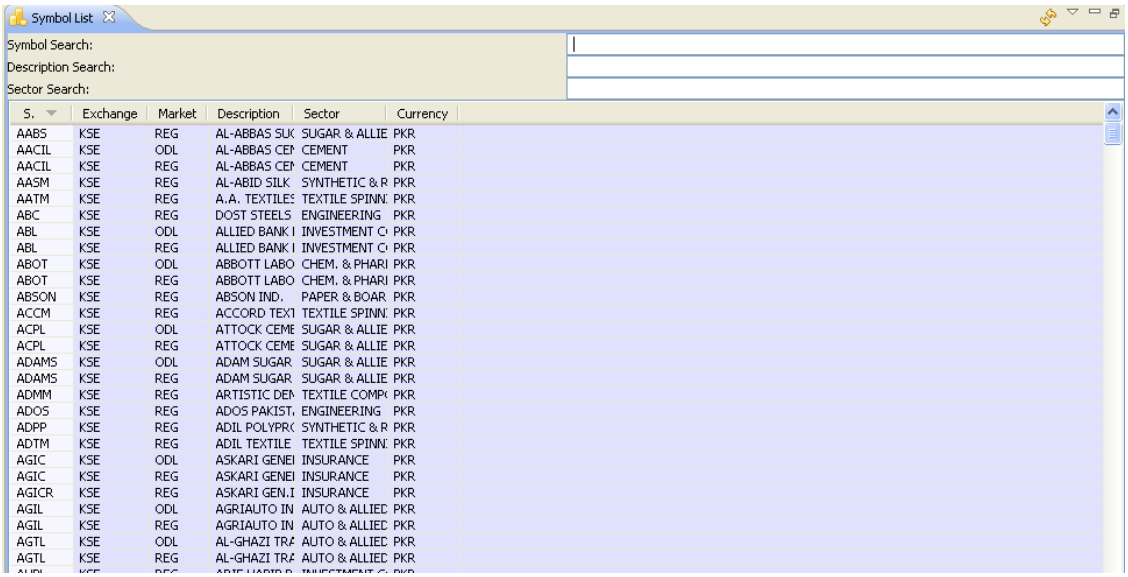

Symbol List
Symbol Search:
Description Search:
Sector Search:
S.
Exchange
Market
Description
Sector
Currency
AABS KSE REG AL-ABBAS SUK SUGAR & ALLIE PKR
AACIL KSE ODL AL-ABBAS CEI CEMENT PKR
AACIL KSE REG AL-ABBAS CEI CEMENT PKR
AASM KSE REG AL-ABID SILK SYNTHETIC & R PKR
AATM KSE REG A.A. TEXTILES TEXTILE SPINN PKR
ABC KSE REG DOST STEELS ENGINEERING PKR
ABL KSE ODL ALLIED BANK I INVESTMENT C PKR
ABL KSE REG ALLIED BANK I INVESTMENT C PKR
ABOT KSE ODL ABBOTT LABO CHEM. & PHARI PKR
ABOT KSE REG ABBOTT LABO CHEM. & PHARI PKR
ABSON KSE REG ABSON IND. PAPER & BOAR PKR
ACCM KSE REG ACCORD TEXT TEXTILE SPINN PKR
ACPL KSE ODL ATTOCK CEME SUGAR & ALLIE PKR
ACPL KSE REG ATTOCK CEME SUGAR & ALLIE PKR
ADAMS KSE ODL ADAM SUGAR SUGAR & ALLIE PKR
ADAMS KSE REG ADAM SUGAR SUGAR & ALLIE PKR
ADMM KSE REG ARTISTIC DEI TEXTILE COMP PKR
ADOS KSE REG ADOS PAKIST. ENGINEERING PKR
ADPP KSE REG ADIL POLYPR SYNTHETIC & R PKR
ADTM KSE REG ADIL TEXTILE TEXTILE SPINN PKR
AGIC KSE ODL ASKARI GENEI INSURANCE PKR
AGIC KSE REG ASKARI GENEI INSURANCE PKR
AGICR KSE REG ASKARI GEN.I INSURANCE PKR
AGIL KSE ODL AGRIAUTO IN AUTO & ALLIED PKR
AGIL KSE REG AGRIAUTO IN AUTO & ALLIED PKR
AGTL KSE ODL AL-GHAZI TRA AUTO & ALLIED PKR
AGTL KSE REG AL-GHAZI TRA AUTO & ALLIED PKR

Figure 23: Symbol List

Screen Explanation

Field	Function
Symbol Search	Type security symbol to search in the list of securities.
Description Search	Type the security description(name) to search in the list of securities.

1.7.3Addition of Securities Automatically

New Option for updating and adding new securities automatically is available. Follow the below given screen, click on the option list will open for user to select "Add new securities automatically". Once an option is selected then the list will be updated automatically in future.

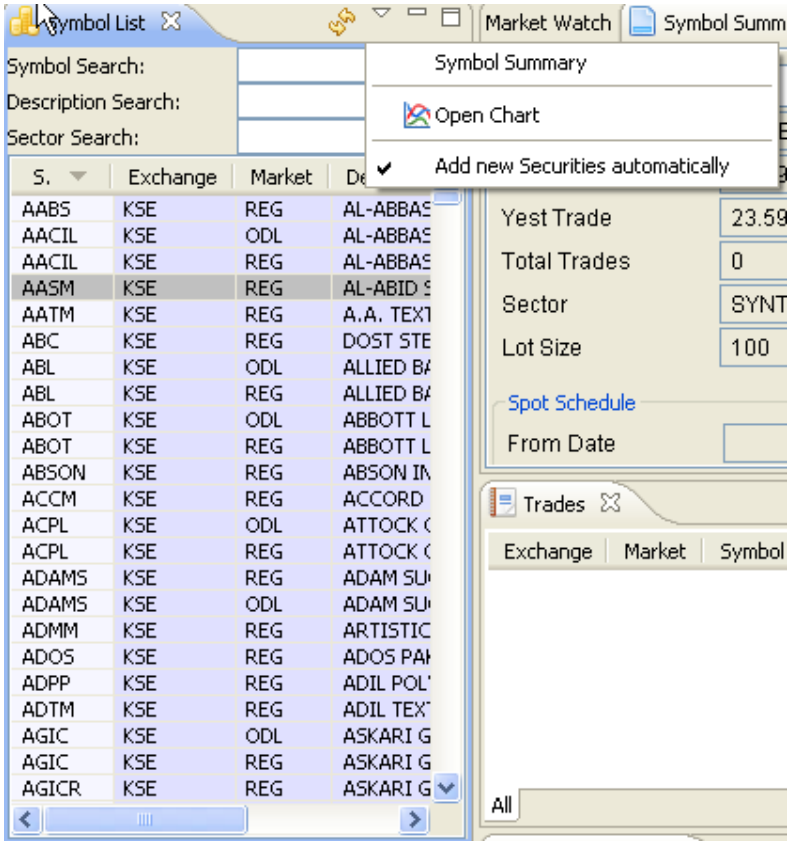
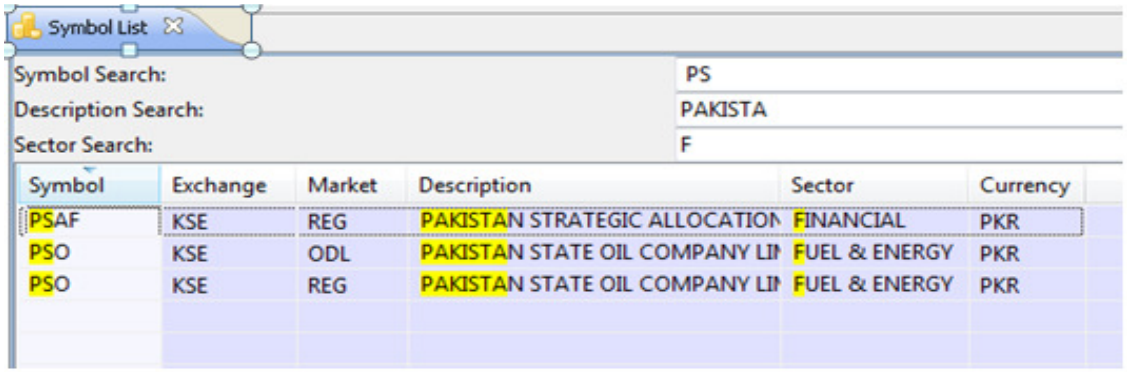


Figure 24: Automatic Addition of Security

1.7.4 Screen: Search Option

User can search the required symbol easily through our search Option. Three types of searching criteria are available for the user. Follow the below screen will guide the user


Symbol List
Symbol Search: PS
Description Search: PAKISTA
Sector Search: F
Symbol Exchange Market Description Sector Currency
PSAF KSE REG PAKISTAN STRATEGIC ALLOCATION FINANCIAL PKR
PSO KSE ODL PAKISTAN STATE OIL COMPANY LI FUEL & ENERGY PKR
PSO KSE REG PAKISTAN STATE OIL COMPANY LI FUEL & ENERGY PKR

Field	Function
Symbol Search	Enter the first two characters; matching result will start appearing in symbols area.
Description Search	User has provided with the option to search through description as well. Means Enter complete word for Example: For PSO enters Pakistan all symbol starts with the name Pakistan will automatically appeared.
Sector Search	Sector wise search option also available. Like Financial, Fuel & Energy etc. This process help user to customize the search. Intelligence search is also active.

1.7.5Utilities Menu – Market Summary

Navigation:

Utilities > Market Summary

Market Summary view displays top gainers, top loser and volume gainers of the market.

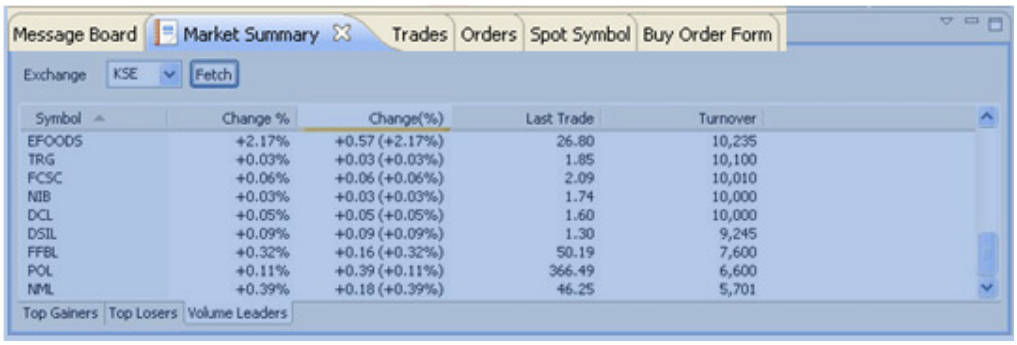


Figure 25: Market Summary

Screen Explanation

Field / Tab	Function
Top Gainers tab	It shows top gaining securities in the market.
Top Losers tab	It shows top losing securities in the market.
Volume Leaders tab	It shows leading volume securities in the market.

1.7.6Utilities Menu – Message Board

Navigation:

Utilities > Message Board (Ctrl + E)

Message view displays event details as they occur.

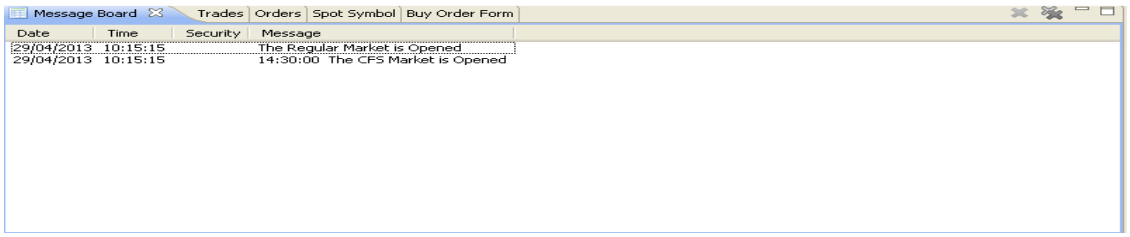


Figure 26: Message Board

1.7.7Utilities Menu – Currencies

Navigation:

Utilities > Currencies

Currencies view displays list of currencies available in the market.

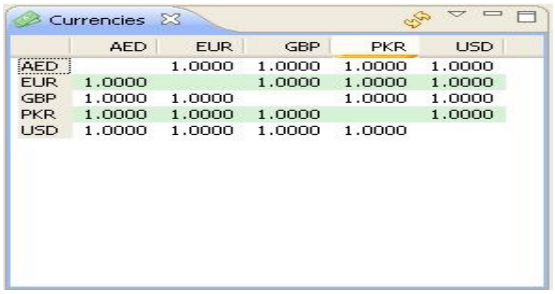


Figure 27: Currencies

1.7.8Utilities – Web Browser

Navigation:

Utilities > Web Browser

Web Brower provides a browser view which allows browsing inside the view.

Figure 28: Web Browser

1.7.9 Utilities Menu – News

Navigation:

Utilities > News

Subscribe to RSS feed by going to Windows > Preferences > News > RSS News. Click Add button and add the URL.

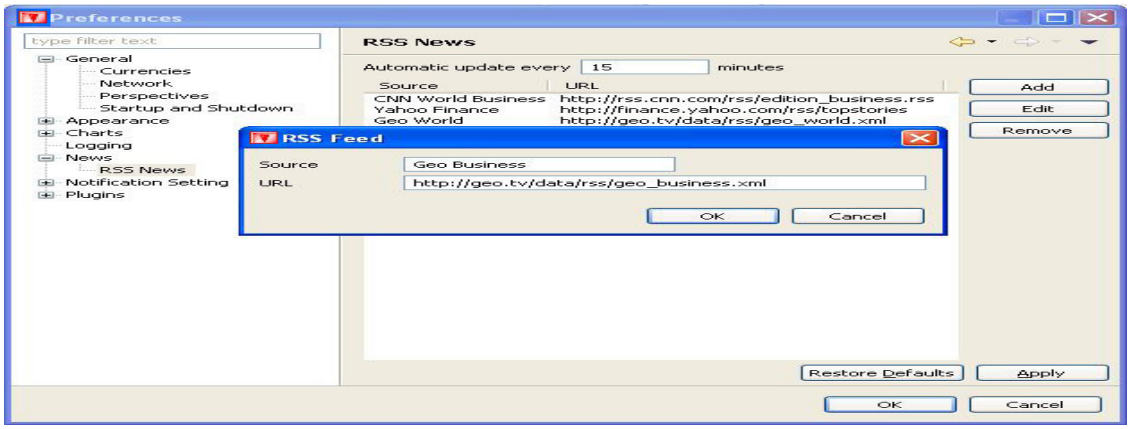


Figure 29: News Preferences

Screen Explanation

Field	Function
Source	Specify the name of the source.
URL	Specify the URL of the source.
Automatic Update	Automatic update time interval in minutes.

Utilities Menu – News (cont.)

News will be displayed in the News View.

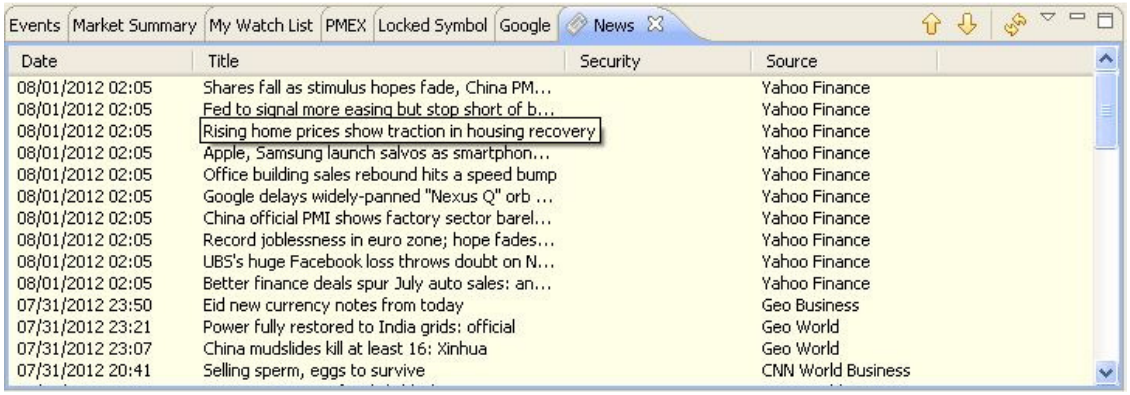

Events
Market Summary
My Watch List
PMEX
Locked Symbol
Google
News
Date
Title
Security
Source
08/01/2012 02:05 Shares fall as stimulus hopes fade, China PM... Yahoo Finance
08/01/2012 02:05 Fed to signal more easing but stop short of b... Yahoo Finance
08/01/2012 02:05 Rising home prices show traction in housing recovery Yahoo Finance
08/01/2012 02:05 Apple, Samsung launch salvos as smartphon... Yahoo Finance
08/01/2012 02:05 Office building sales rebound hits a speed bump Yahoo Finance
08/01/2012 02:05 Google delays widely-panned "Nexus Q" orb ... Yahoo Finance
08/01/2012 02:05 China official PMI shows factory sector barel... Yahoo Finance
08/01/2012 02:05 Record joblessness in euro zone; hope fades... Yahoo Finance
08/01/2012 02:05 UBS's huge Facebook loss throws doubt on N... Yahoo Finance
08/01/2012 02:05 Better finance deals spur July auto sales: an... Yahoo Finance
07/31/2012 23:50 Eid new currency notes from today Geo Business
07/31/2012 23:21 Power fully restored to India grids: official Geo World
07/31/2012 23:07 China mudslides kill at least 16: Xinhua Geo World
07/31/2012 20:41 Selling sperm, eggs to survive CNN World Business

Figure 30: News

1.8 Window Menu

1.8.1 Window Menu – Open New Window

Navigation:

Window > Open New Window

Open New Window opens a new Window of the terminal.

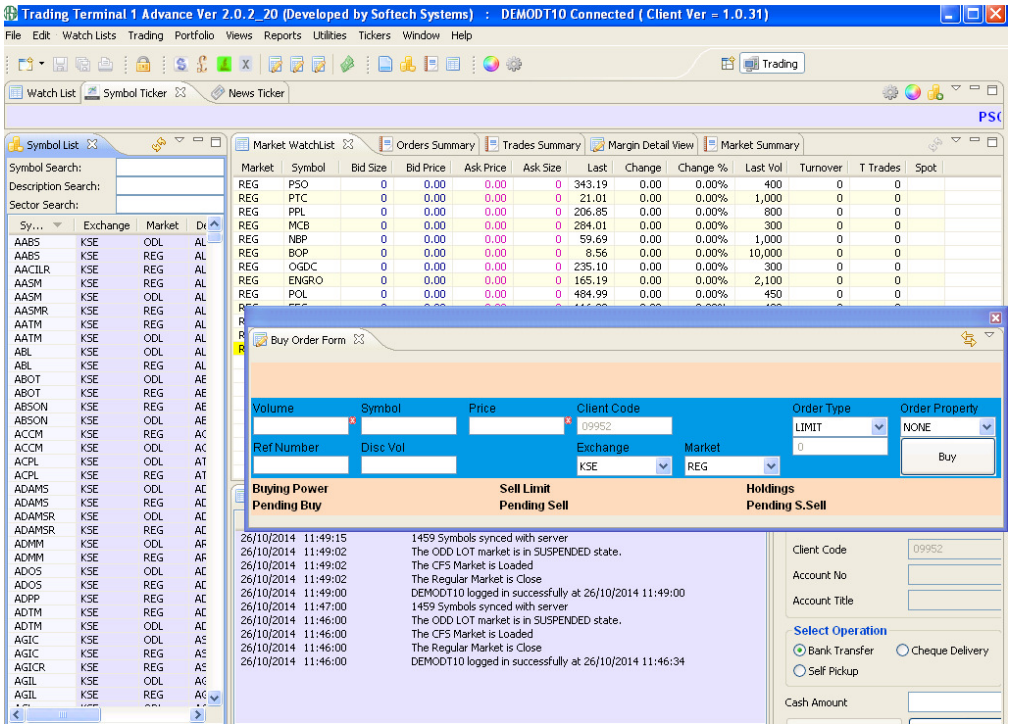


Figure 31: Open New Window

1.8.2 Window Menu – Open Perspective

Navigation:

Window > Open Perspective > Other

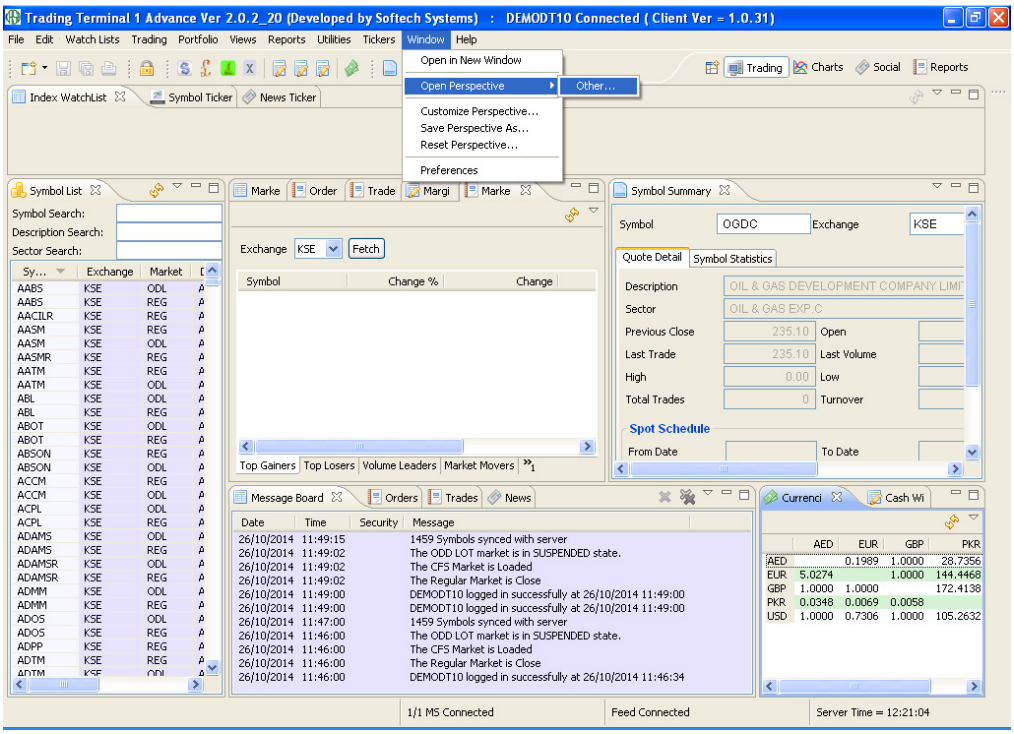

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Open in New Window
Open Perspective
Other...
Customize Perspective...
Save Perspective As...
Reset Perspective...
Preferences
Trading Charts Social Reports
Index WatchList Symbol Ticker News Ticker
Symbol List
Symbol Search:
Description Search:
Sector Search:
Symbol Summary
Symbol OGDC Exchange KSE
Quote Detail Symbol Statistics
Description OIL & GAS DEVELOPMENT COMPANY LIMI
Sector OIL & GAS EXP.C
Previous Close 235.10 Open
Last Trade 235.10 Last Volume
High 0.00 Low
Total Trades 0 Turnover
Spot Schedule
From Date To Date
Exchange KSE Fetch
Symbol Change % Change
Top Gainers Top Losers Volume Leaders Market Movers
Message Board Orders Trades News
Date Time Security Message
26/10/2014 11:49:15 1459 Symbols synced with server
26/10/2014 11:49:02 The ODD LOT market is in SUSPENDED state.
26/10/2014 11:49:02 The CFS Market is Loaded
26/10/2014 11:49:02 The Regular Market is Close
26/10/2014 11:49:00 DEMODT10 logged in successfully at 26/10/2014 11:49:00
26/10/2014 11:49:00 DEMODT10 logged in successfully at 26/10/2014 11:49:00
26/10/2014 11:47:00 1459 Symbols synced with server
26/10/2014 11:46:00 The ODD LOT market is in SUSPENDED state.
26/10/2014 11:46:00 The CFS Market is Loaded
26/10/2014 11:46:00 The Regular Market is Close
26/10/2014 11:46:00 DEMODT10 logged in successfully at 26/10/2014 11:46:34
Currenci Cash Wi
AED EUR GBP PKR
AED 0.1989 1.0000 28.7356
EUR 5.0274 1.0000 144.4468
GBP 1.0000 1.0000 172.4138
PKR 0.0348 0.0069 0.0058
USD 1.0000 0.7306 1.0000 105.2632
1/1 MS Connected
Feed Connected
Server Time = 12:21:04

Figure 32: Open Perspective

To open a new perspective, select other in Open Perspective.

Window Menu – Open Perspective (cont.)

Following popup dialog appears.

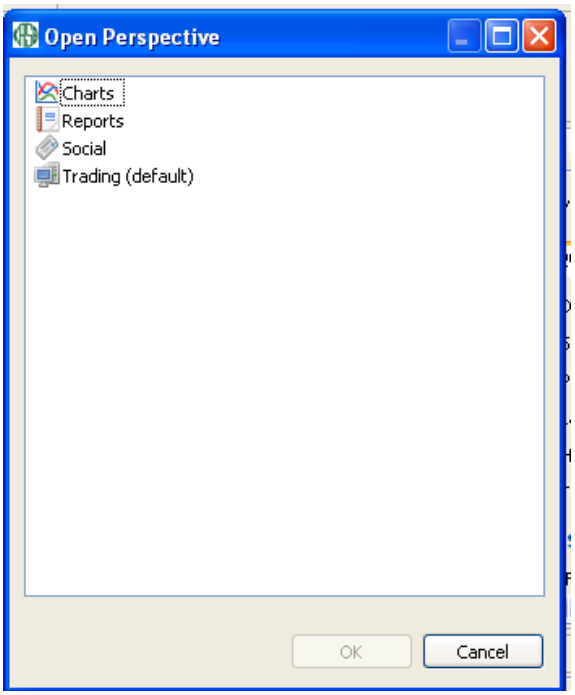


Figure33: Open Perspective Dialog

Select the perspective to open. Perspective is opened.

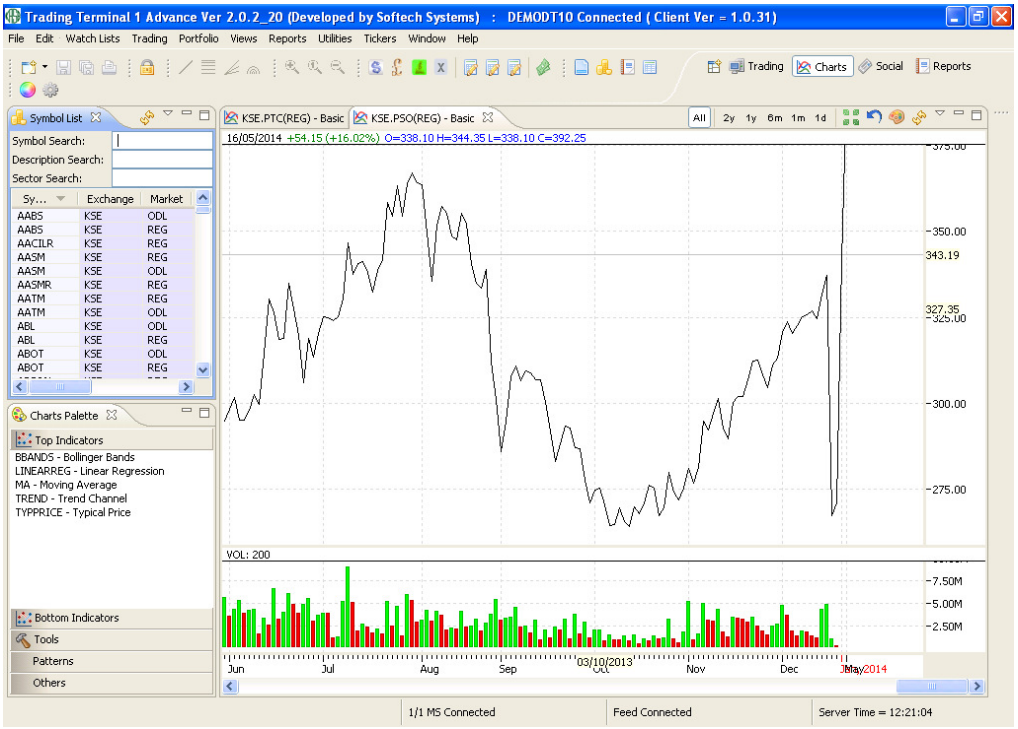


Figure 34: Charts Perspective

1.8.3Window Menu – Customize Perspective

Navigation:

Window > Customize Perspective

Perspective can be customized with toolbar visibility, menu visibility, command groups availability and shortcuts.

Click on the toolbar visibility tab to customize the toolbar. Following window appears.

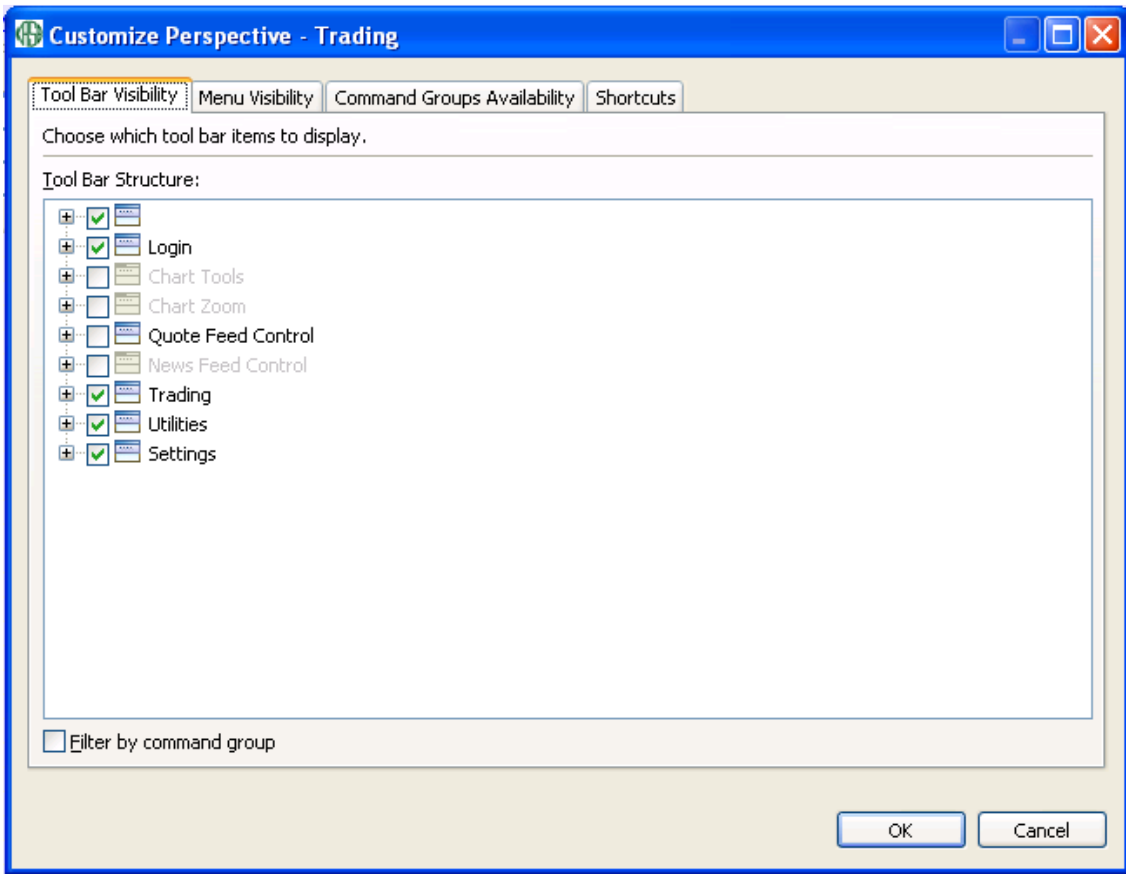


Figure35: Tool Bar Visibility

Screen Explanation

Checkbox	Function
New	New appears on the toolbar
Save (Ctrl +S)	Save option appears on the toolbar
Save All(Ctrl +Shift +S)	Save All option appears on the toolbar
Print (Ctrl + P)	Print option appears in the toolbar as well as on appropriate places

Window Menu – Customize Perspective (cont.)

Checkbox	Function
Line	Line tool appears in the charts perspective
FiboLine	FiboLine tool appears in the charts perspective
FanLine	FanLine tool appears in the charts perspective
FiboArc	FiboArd tool appears in the charts perspective
Zoom In	Zooms in
Normal Size	Display normal zoom
Zoom Out	Zooms out
Start News Feed	Starts news feed
Stop News Feed	Stops news feed
Start quote feed	Starts quote feed
Take a quote snapshot	Takes a quote snapshot
Stop quote feed	Stops quote
Filter by command group	Filters by command group

Window Menu – Customize Perspective (cont.)

Click on the Menu Visibility tab to customize the Menu Bar. Following window appears.

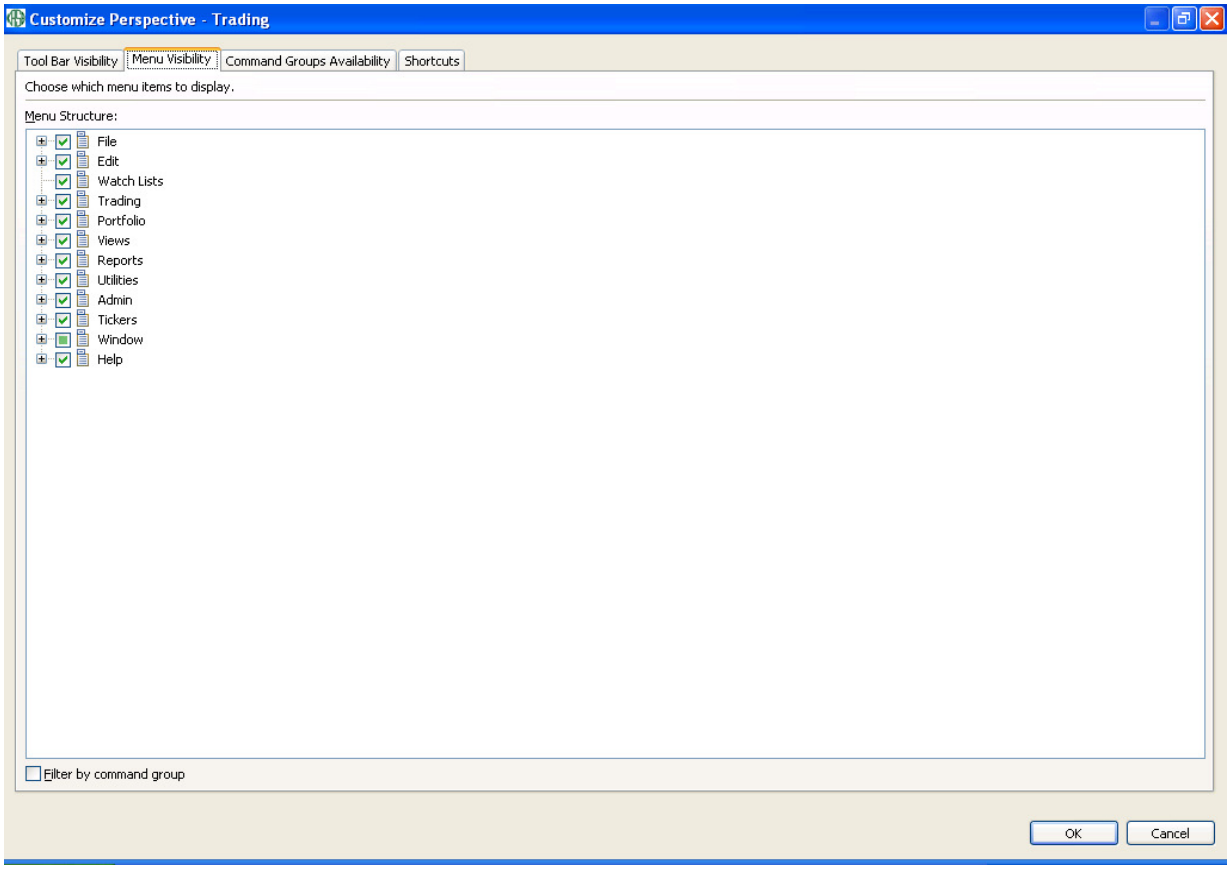


Figure36: Menu Visibility

Window Menu – Customize Perspective (cont.)

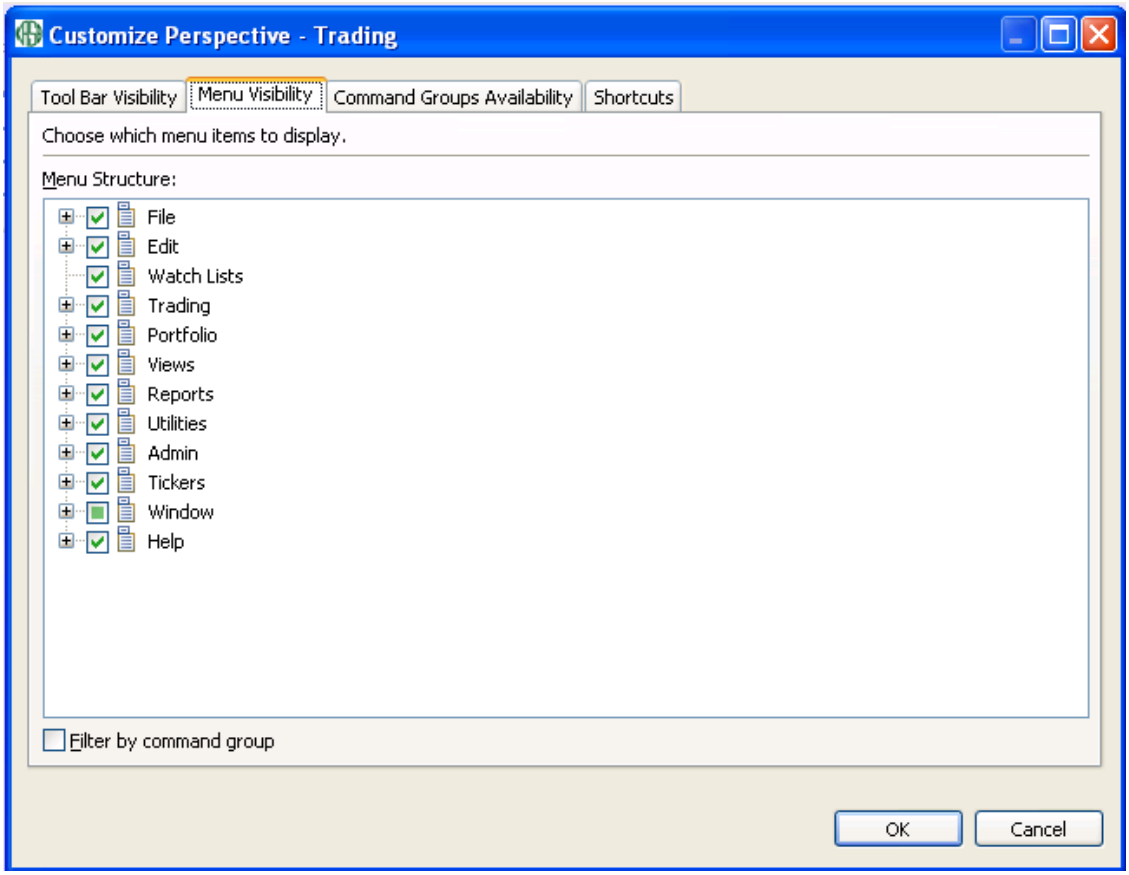


Figure37: Menu Visibility - File Menu

Appropriate menu appears on the menu bar on checking appropriate menu items in the menu visibility. Different menu items are represented in this section.

Screen Explanation

Checkbox	Function
File Menu	
New Wizard	Displays New Watch List Wizard menu
Close	Displays Close menu
Close All	Displays Close All menu
Save	Displays Save menu
Save As	Displays Save As menu
Save All	Displays Save All menu
Print	Displays Print menu and appropriate print options
Export	Displays Export menu
Properties	Displays properties menu
Exit	Displays Exit menu

Window Menu – Customize Perspective (cont.)

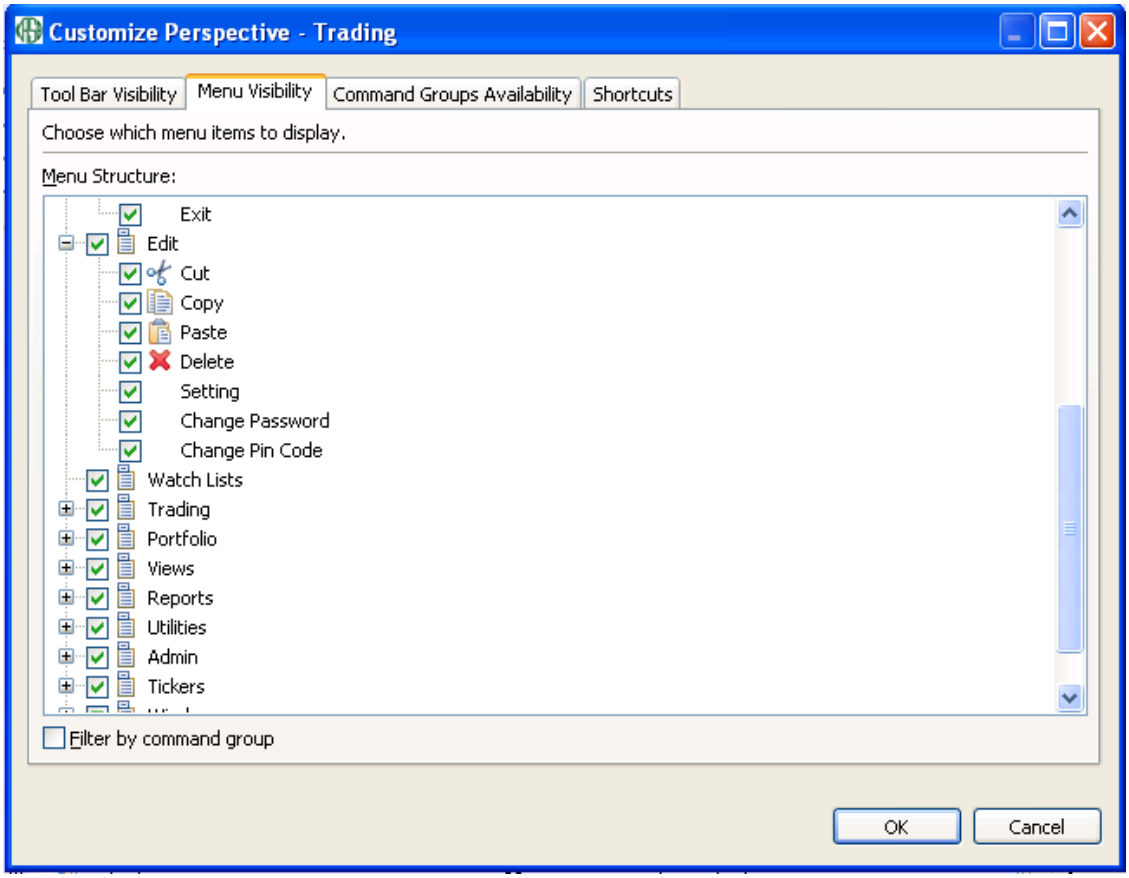


Figure 38: Menu Visibility - Edit Menu

Screen Explanation

Checkbox	Function
Edit Menu	
Cut	Displays Cut menu
Copy	Displays Copy menu
Paste	Displays Paste menu
Delete	Displays Delete menu
Setting	Displays Setting menu
Change Password	Displays Change Password menu

Window Menu – Customize Perspective (cont.)

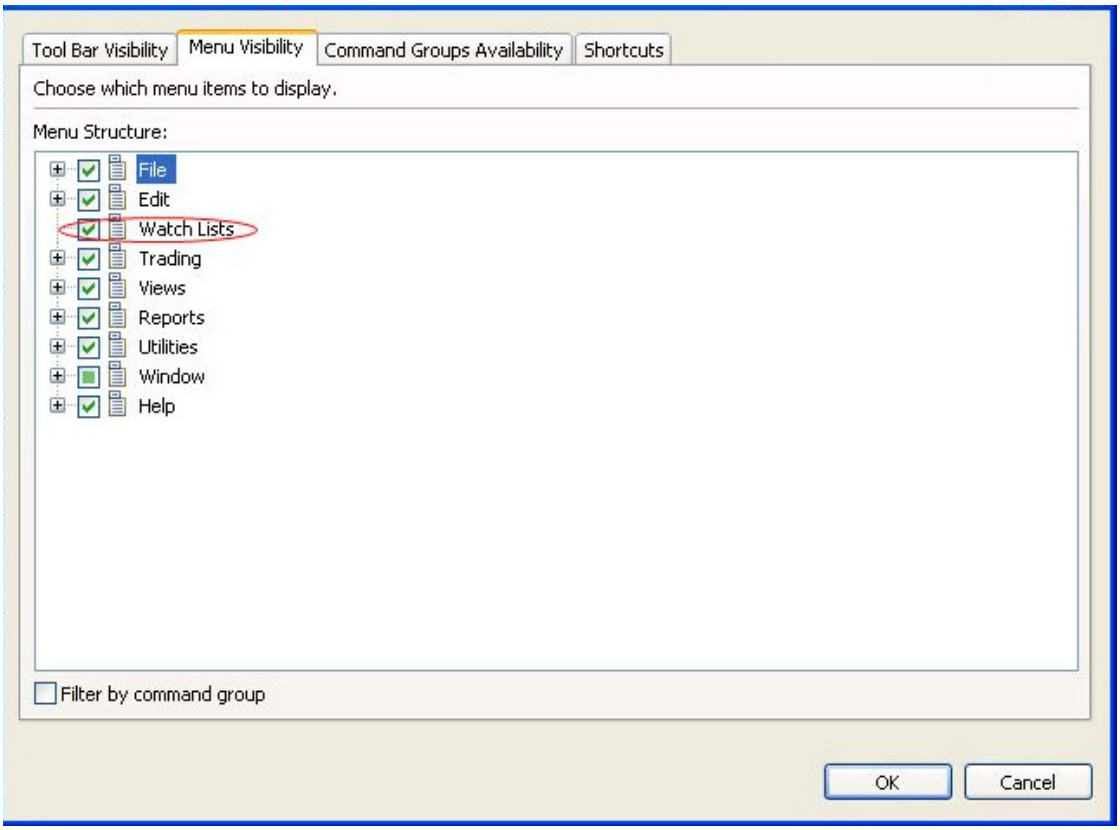


Figure 39: Menu Visibility – Watch Lists

Screen Explanation

Checkbox	Function
Watch Lists	Displays Watch Lists menu

Window Menu – Customize Perspective (cont.)

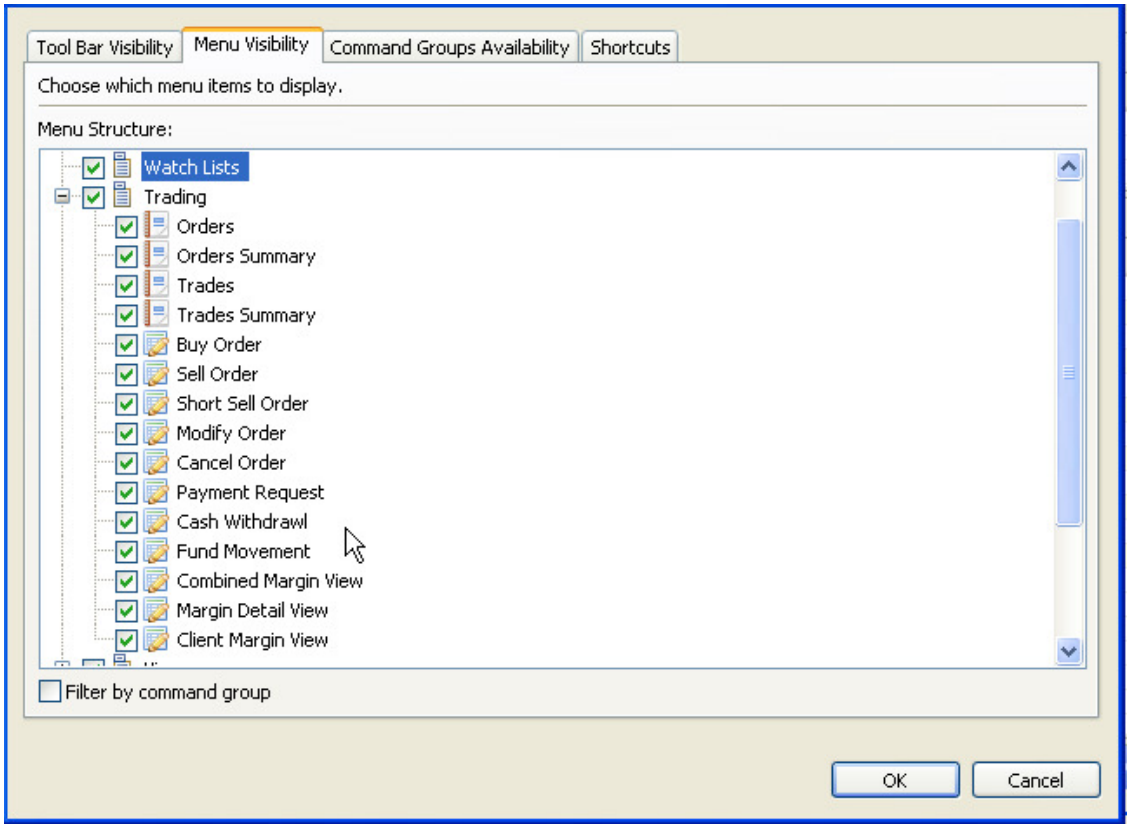


Figure 40: Menu Visibility – Trading Menu

Screen Explanation

Checkbox	Function
Trading Menu	
Orders	Displays Orders menu
Orders Summary	Displays Orders Summary menu
Trades	Displays Trades menu
Trades Summary	Displays Trades Summary menu
Buy Order	Displays Buy Order menu
Sell Order	Displays Sell Order menu
Cancel Order	Displays Cancel menu
Cash Withdrawal	Displays Cash Withdrawal Menu
Margin Detail View	Displays Margin Detail View menu

Window Menu – Customize Perspective (cont.)

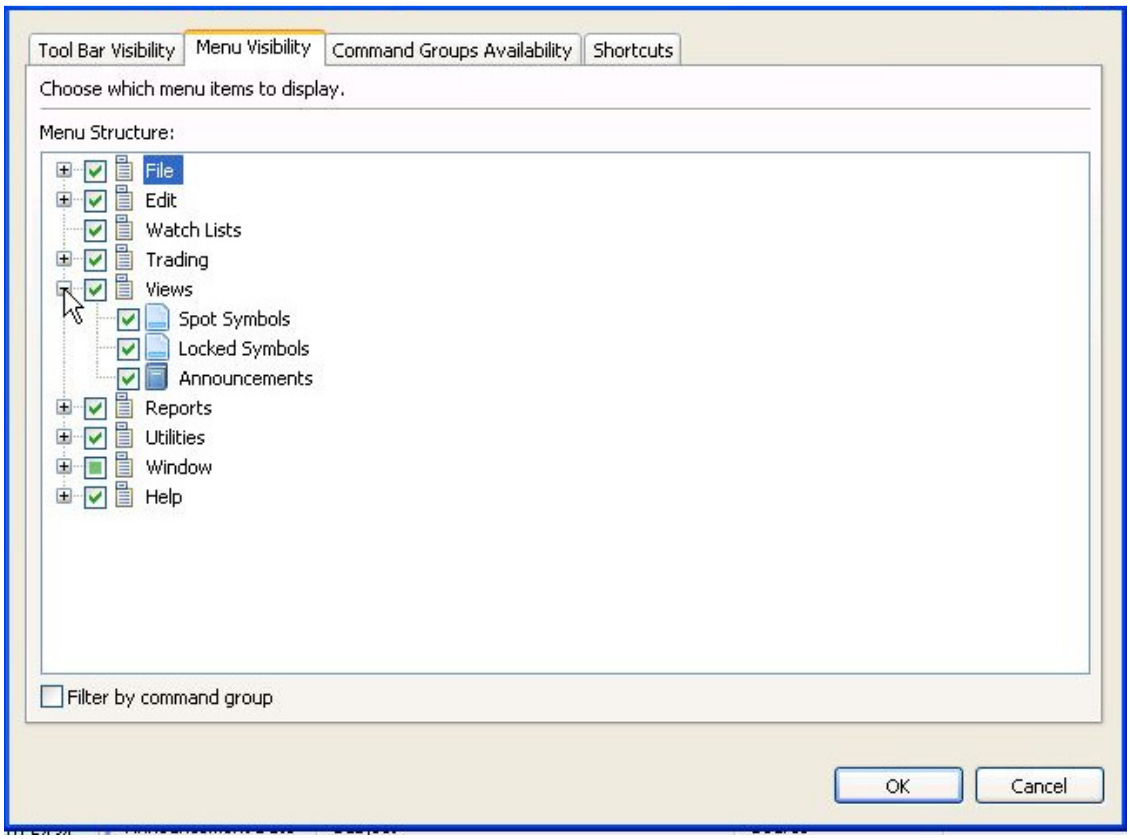


Figure 41: Menu Visibility – View Menu

Screen Explanation

Checkbox	Function
Views Menu	
Spot Symbols	Displays Spot Symbols menu
Locked Symbols	Displays Locked Symbols menu
Announcements	Displays Announcements menu

Window Menu – Customize Perspective (cont.)

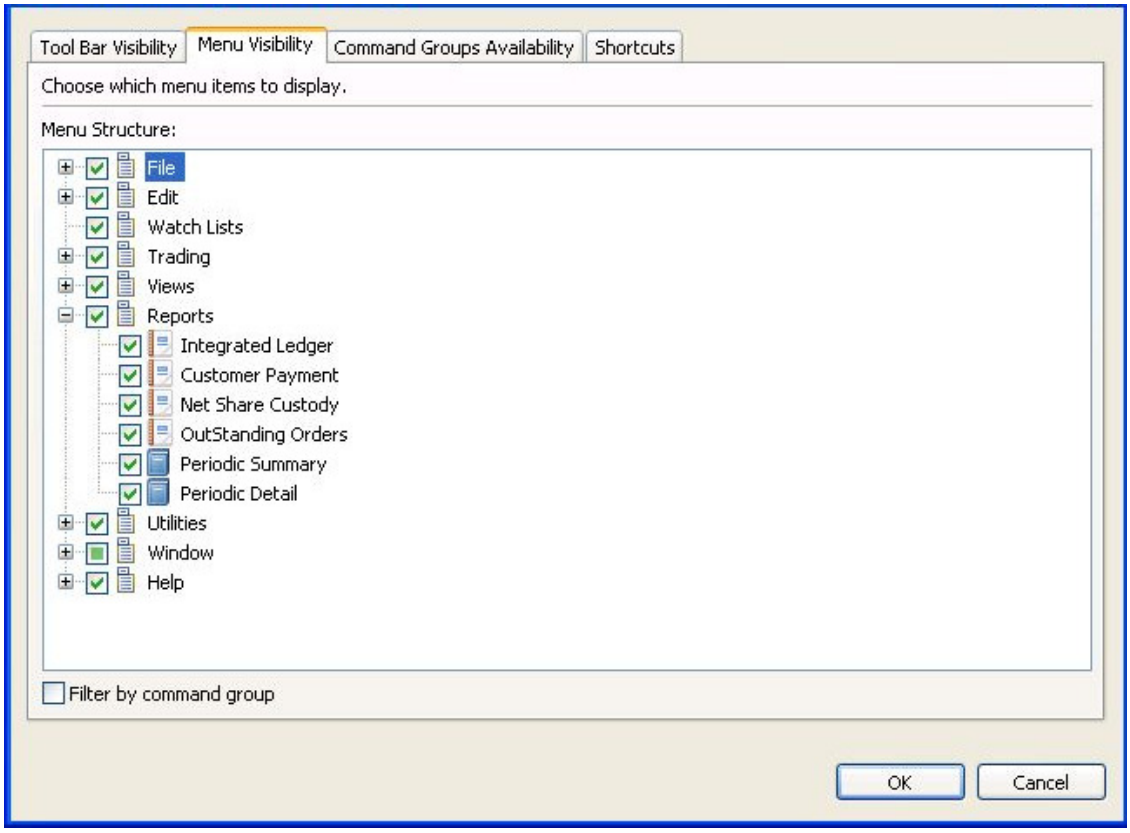


Figure 42: Menu Visibility – Reports Menu

Screen Explanation

Checkbox	Function
Reports Menu	
Integrated Ledger	Displays Integrated Ledger report
Customer Payment	Displays Customer Payment report
Net Share Custody	Displays Net Share Custody report
Outstanding Orders	Displays Outstanding Orders report
Periodic Summary	Displays Periodic Summary report
Periodic Detail	Displays Periodic Detail report

Window Menu – Customize Perspective (cont.)

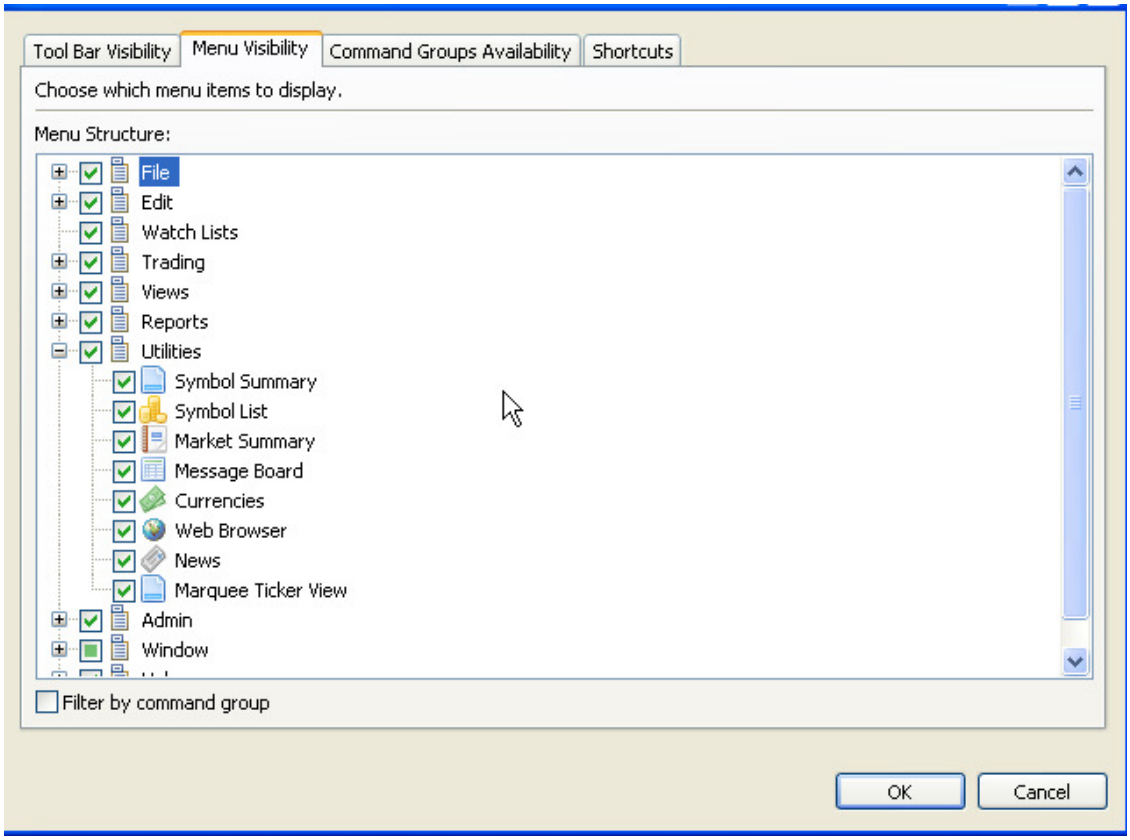


Figure 43: Menu Visibility – Utilities Menu

Screen Explanation

Checkbox	Function
Utilities Menu	
Quote Request	Displays Quote Request on menu as well as on right clicking the security
Securities	Displays Securities menu
Market Summary	Displays Market Summary menu
Message Board	Display Message Board
Currencies	Displays Currencies menu
Web Browser	Displays Web Browser menu
News	Displays News menu

Window Menu – Customize Perspective (cont.)

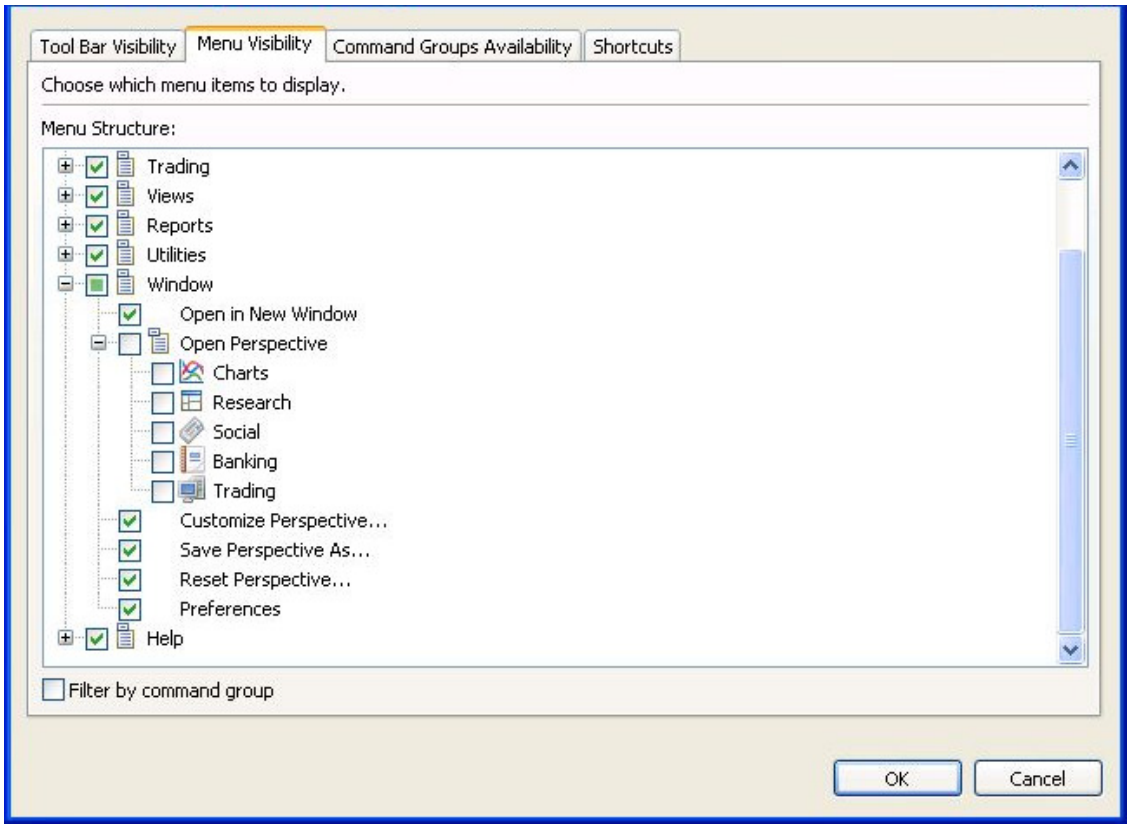


Figure 44: Menu Visibility – Window Menu

Screen Explanation

Checkbox	Function
Window Menu	
Open New Window	Displays Open New Window menu
Open Perspective	Displays Open Perspective menu with open option as Chart, Social, Reports and Trading.
Customize Perspective	Displays Customize Perspective menu
Save Perspective As	Displays Save Perspective As menu
Reset Perspective	Displays Reset Perspective menu
Preferences	Displays Preferences menu

Window Menu – Customize Perspective (cont.)

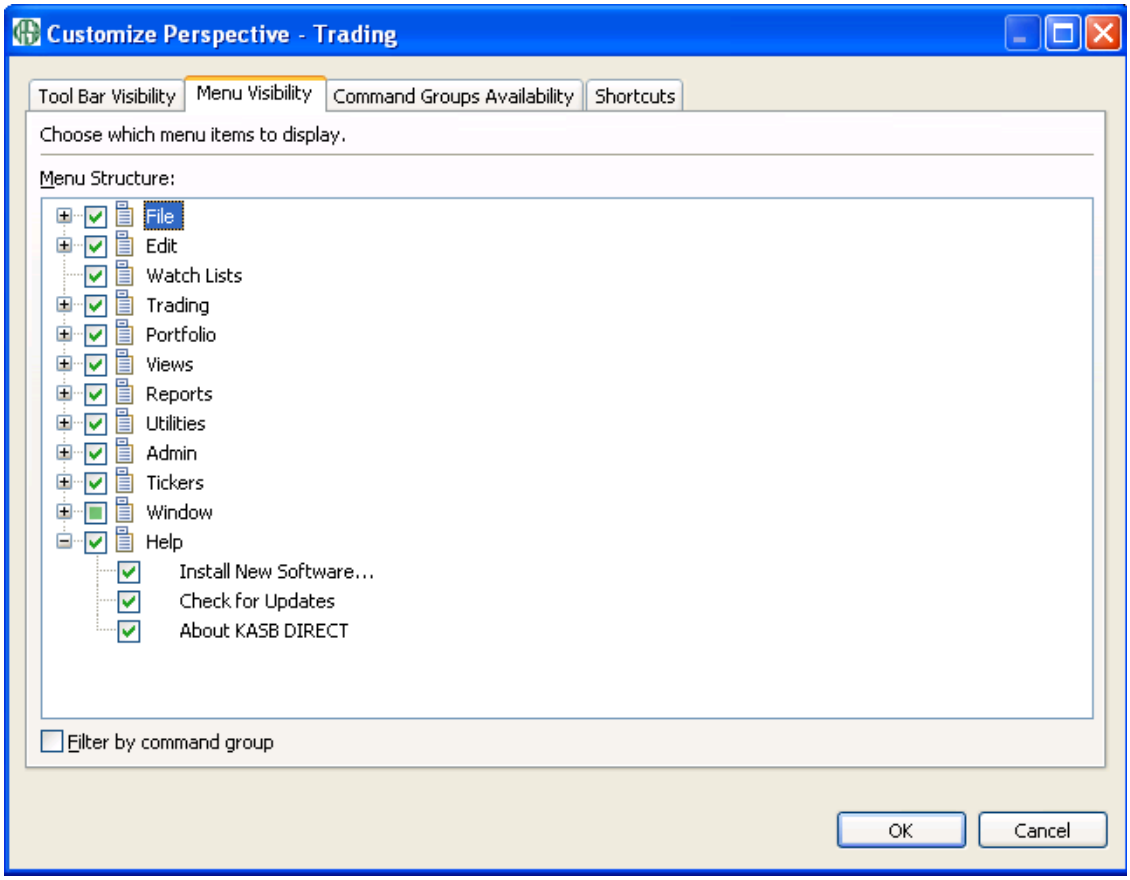


Figure 45: Menu Visibility – Help Menu

Screen Explanation

Checkbox	Function
Help Menu	
Install New Software	Displays Install New Software menu
Check for Updates	Displays Check for updates menu
About KASB DIRECT Trading Terminal	Displays About KASB DIRECT Trading Terminal menu

1.8.4 Window Menu – Save Perspective As

Navigation:

Window – Save Perspective As

Saves the perspective as the name specified.

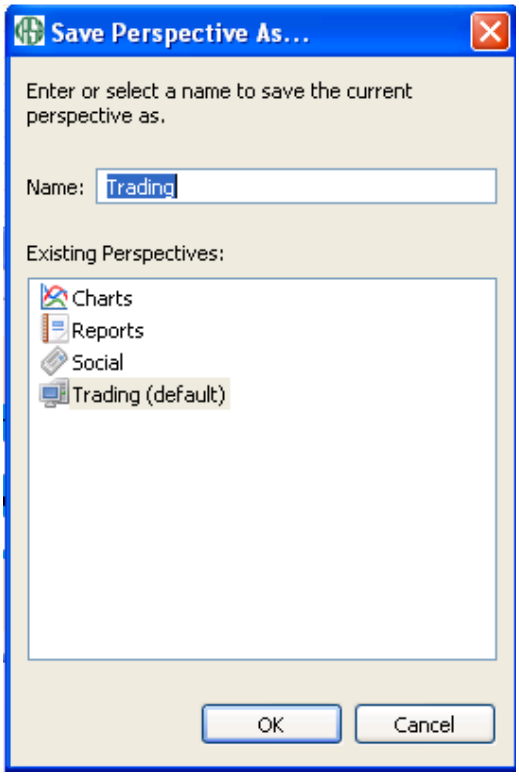


Figure 46: Save Perspective As

Screen Explanation

Field	Function
Name	Name of the file to be saved.

1.8.5 Window Menu – Reset Perspective

Navigation:

Window > Reset Perspective

Resets the perspective to default

1.8.6 Window Menu – Preferences

Navigation

Window > Preferences

Tree Hierarchy:

- General
  - Currencies
  - Network
  - Perspectives
  - Startup and Shutdown
- Appearance
  - Colors and Fonts
- Charts
  - Default Values
- Logging
- News
  - RSS News
- Notification Setting
  - KSE Announcement Setting
  - Locked Symbols
  - Orders and Trades
- Plugin
  - Online Server
- Report

Window Menu – Preferences (cont.)

General – Currencies

Check the currencies from the checkboxes provided.

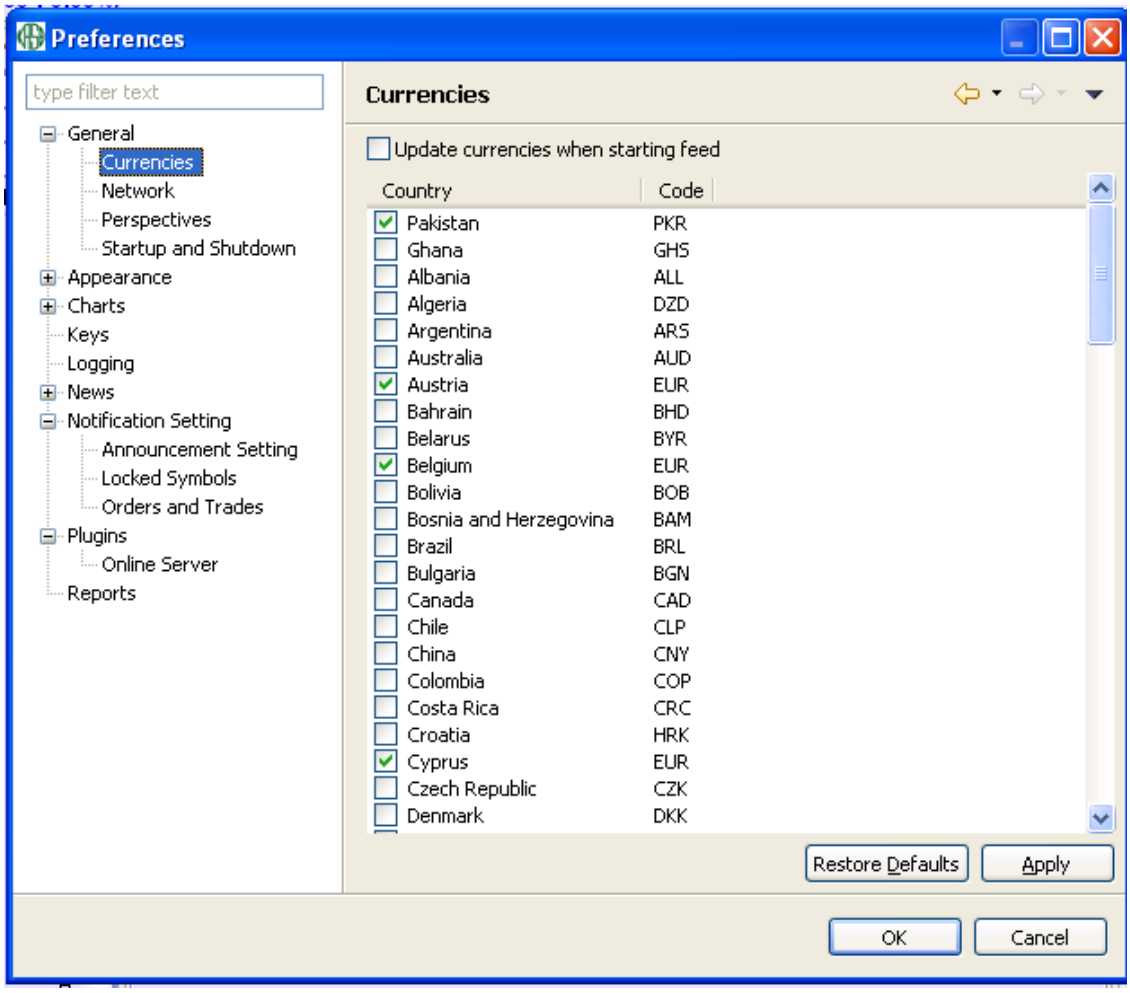


Figure 47: Preferences – General - Currencies

Screen Explanation

Checkbox	Function
Update currencies when starting feed	Check this checkbox when to update currencies when starting a feed

Window Menu – Preferences (cont.)

General - Network

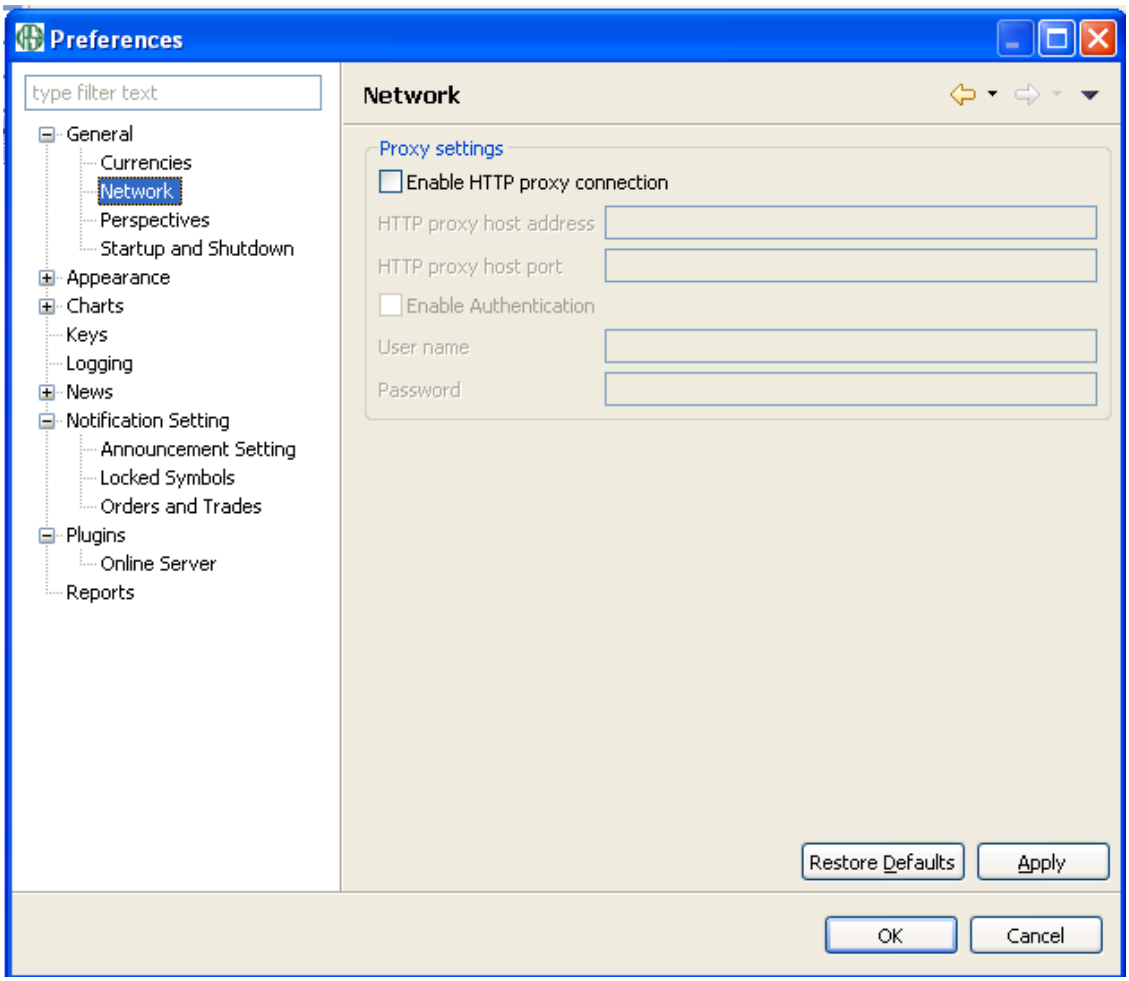


Figure 48: Preferences –General - Network

Screen Explanation

Checkbox or Field	Function
Enable HTTP Proxy connection	Check this checkbox if you are using a proxy server
HTTP proxy host address	Give IP address or hostname of the proxy server
HTTP proxy host port	Give port used for the proxy server
Enable Authentication	Check if your proxy server is using authentication
User name	Give proxy user name
Password	Give proxy user password

Window Menu – Preferences (cont.)

General – Perspectives

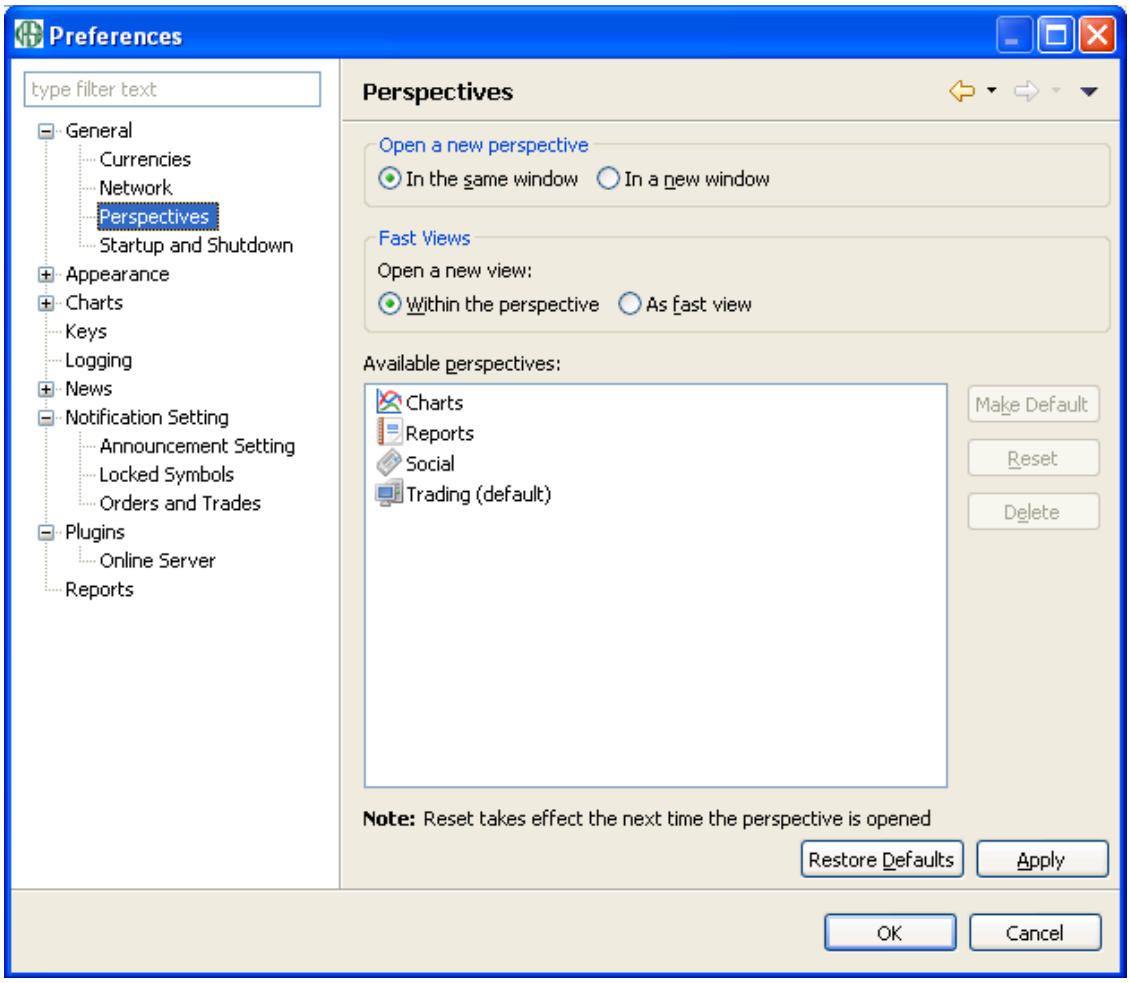


Figure 49: Preferences – General - Perspectives

Screen Explanation

Checkbox or Field	Function
Open a new perspective - open new perspective in the same window or in a new window	To open new perspective in the same window or in a new window select appropriate radio button
Fast View – Open a new view within the perspective or as a fast view	Select appropriate radio button to open view within the perspective or as a fast view.
Available perspectives	You can select appropriate perspective to make default, reset or delete it.

Window Menu – Preferences (cont.)

General – Startup and Shutdown

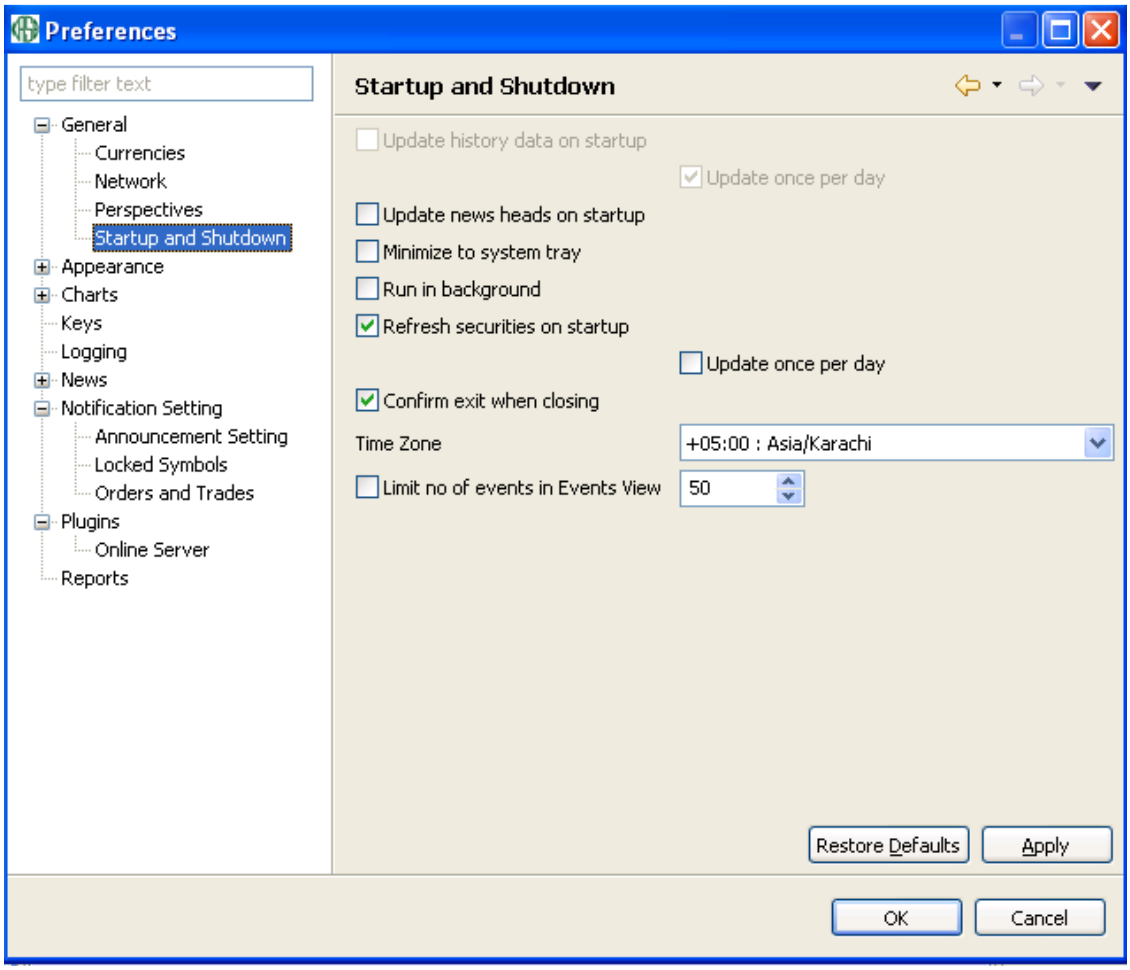


Figure 50: Preferences – General – Startup and Shutdown

Screen Explanation

Checkbox	Function
Update history data on startup	Updates history data on startup
Update new heads on startup	Updates news headlines on startup
Minimize to system tray	Enables the option to minimize to system tray
Refresh securities on startup	Refreshes securities on startup
Confirm exit when closing	Prompts for confirmation of exit when closing terminal

Window Menu – Preferences (cont.)

Appearance

To change appearance or startup, select the appropriate item from the navigation tree and press edit. For example in the figure Announcements and Recently Added Item and background is selected. Select the color and press Apply button to apply changes. Press “Use System Font” to use system font.

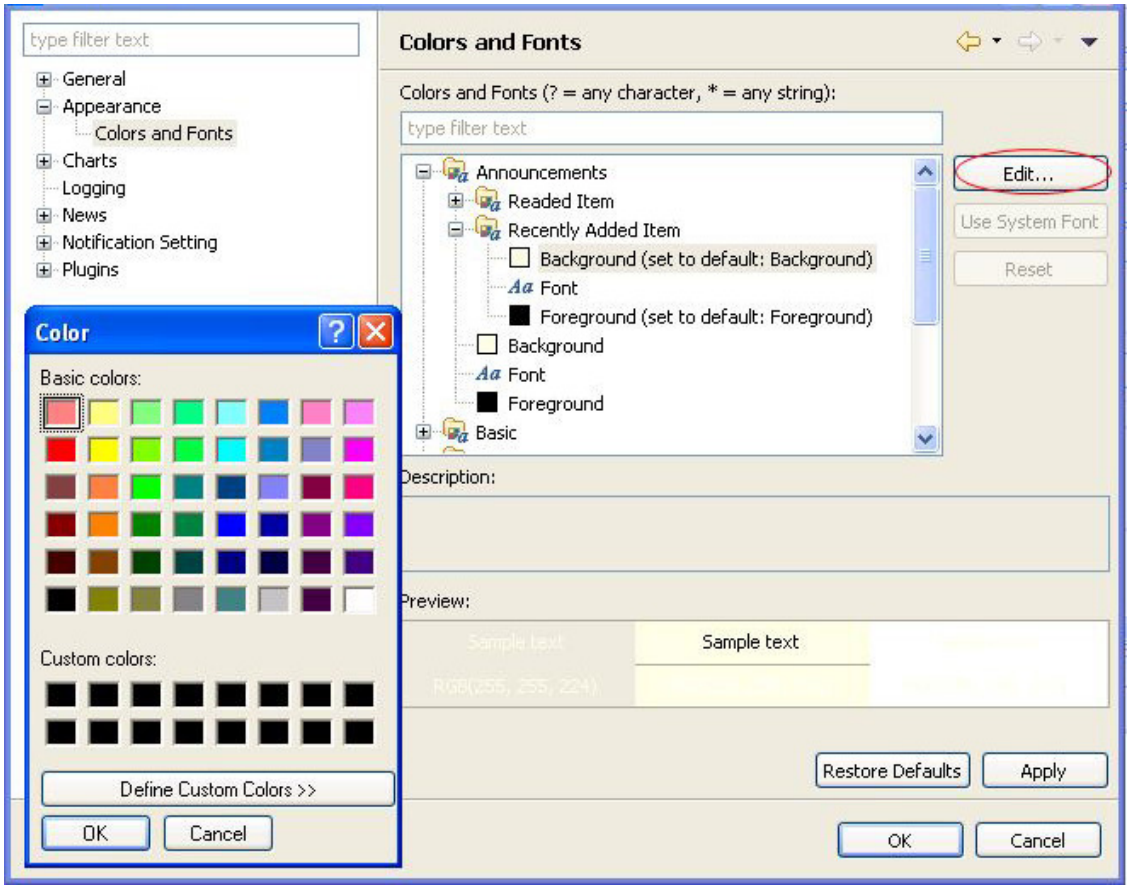


Figure 51: Preferences – Appearance – Colors and Fonts

Window Menu – Preferences (cont.)

Charts – Default Values

Specify appropriate time limit for data to be maintained.

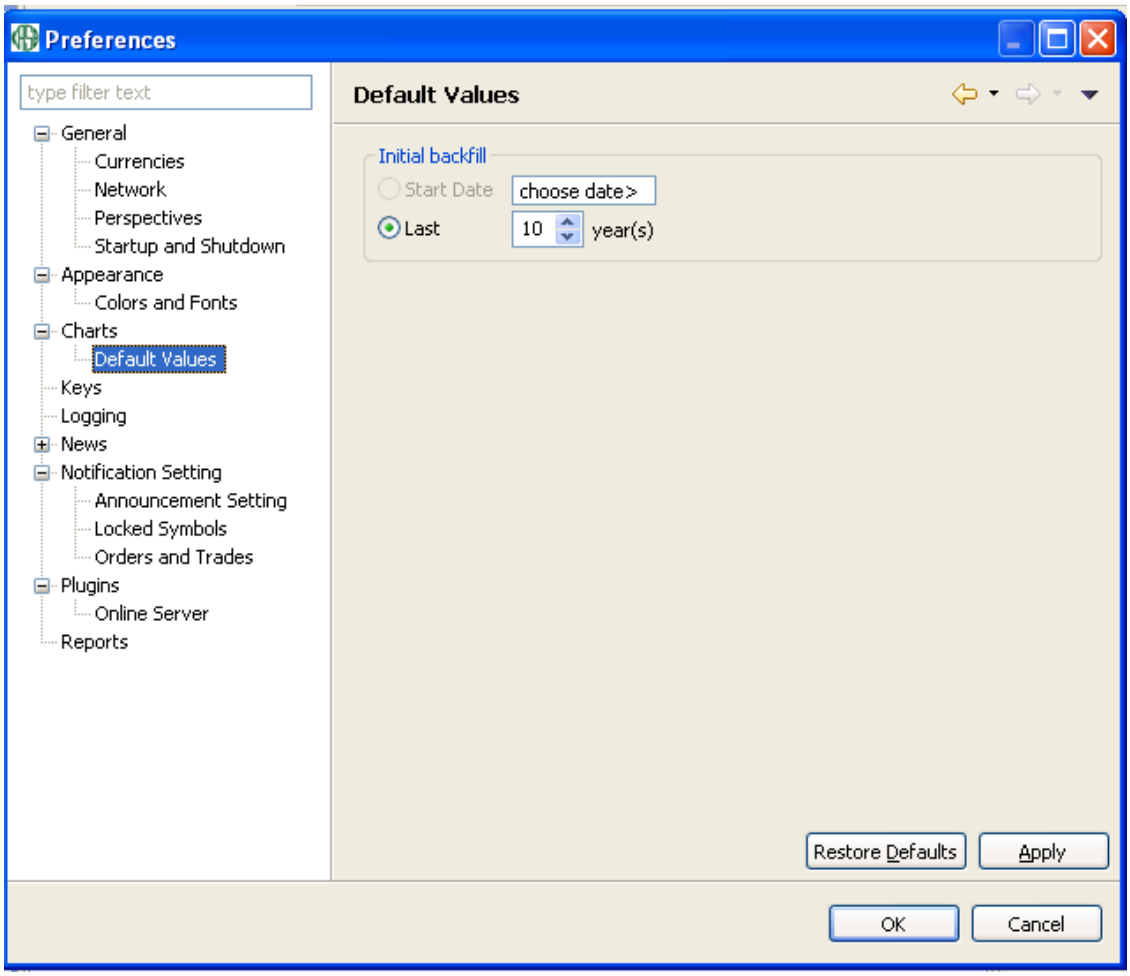


Figure 52: Preferences – Charts–Default Values

Screen Explanation

Checkbox	Function
Initial backfill	Select appropriate time for initial backfill. By default it is last 5 years.

Window Menu – Preferences (cont.)

Logging

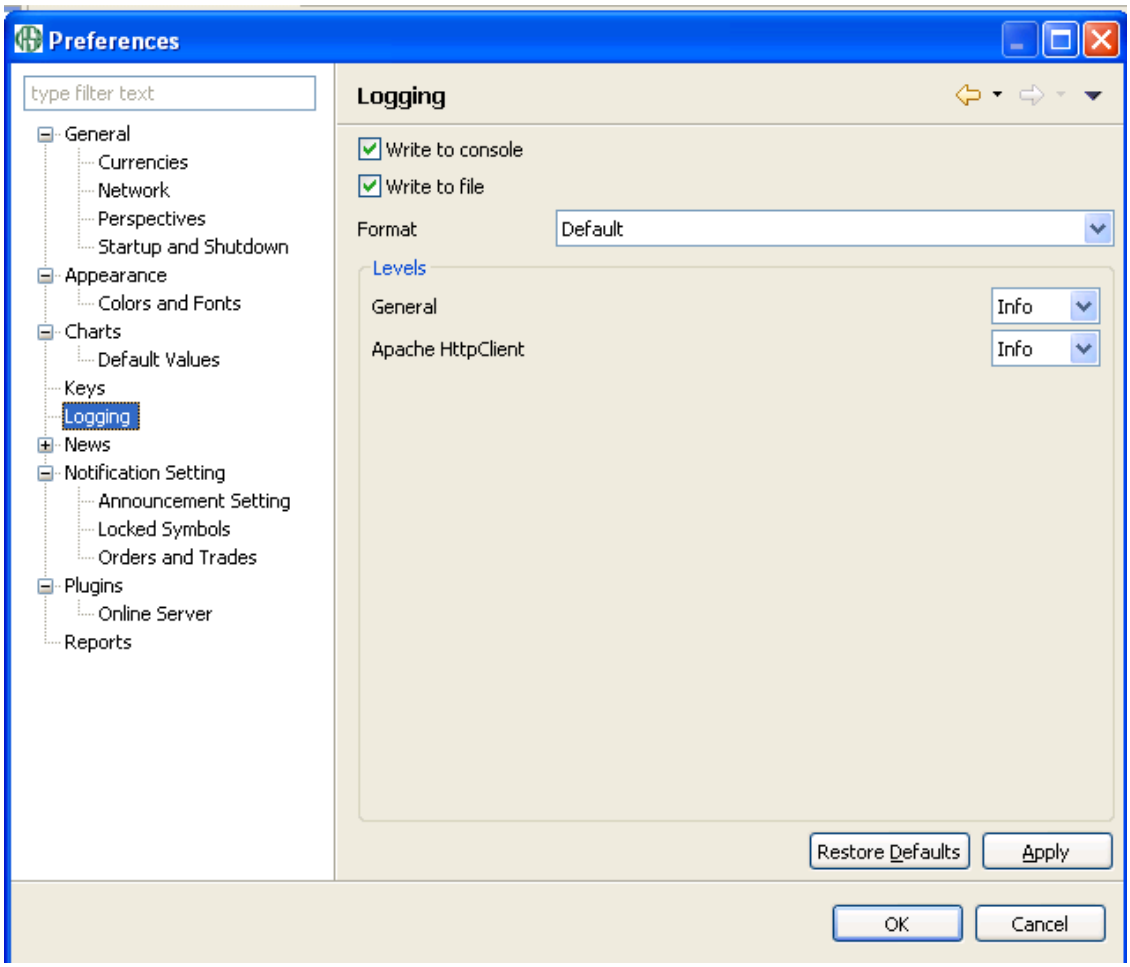


Figure 53: Preferences – Logging

Screen Explanation

Checkbox or Field	Function
Write to console	Writes the log to console
Write to file	Writes the log to default file. Format is default or extended
Levels – General	Logging levels are Off, Fatal, Error, Warn, Info, Debug and All. If All is selected all logging is enabled
Levels - Apache HttpClient	Logging levels are same as General

Window Menu – Preferences (cont.)

News

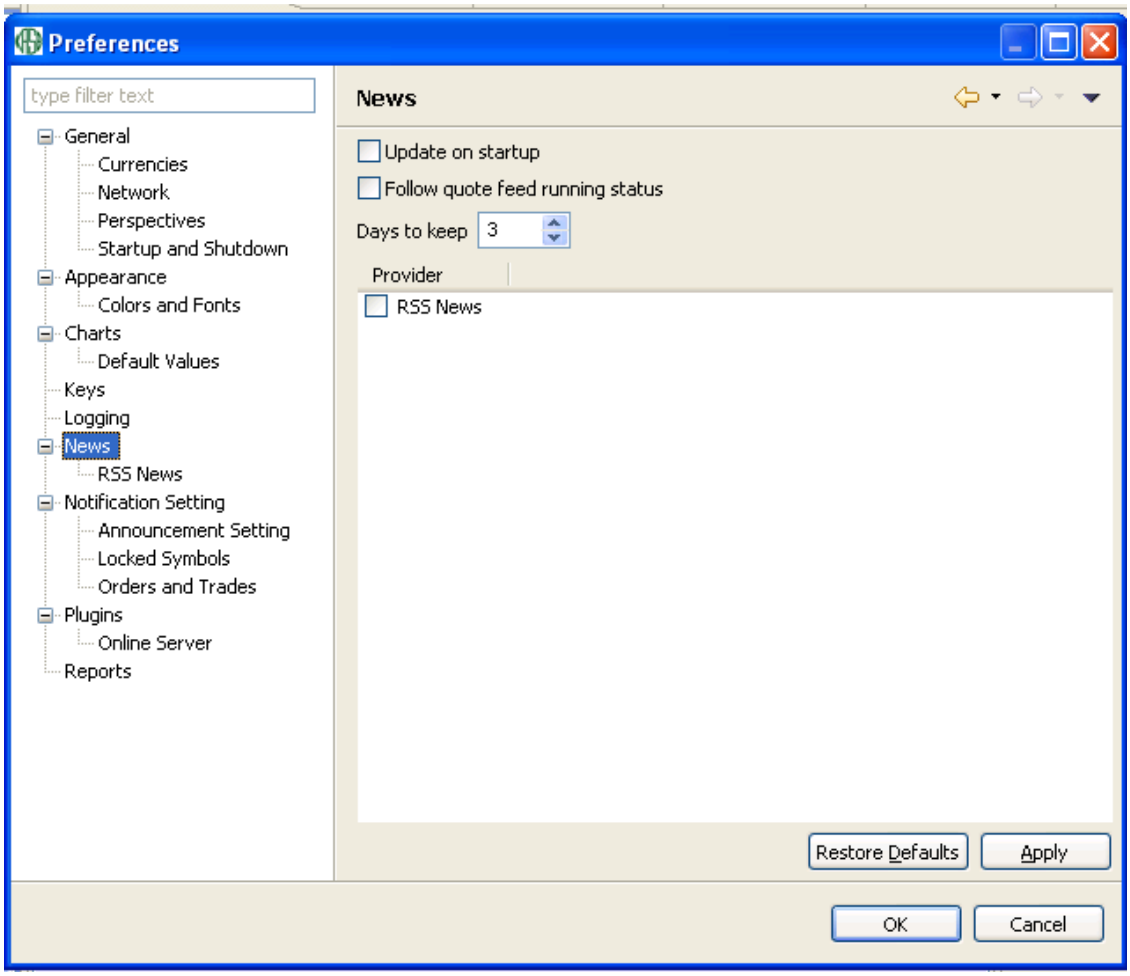


Figure 54: Preferences – News

Screen Explanation

Checkbox or Field	Function
Update on startup	Updates news feed on startup
Follow quote feed running status	Keeps numbers feeds up to the number specified
Provider	Check RSS News provider

News – RSS News

Already explained in 1.6.7 i.e. Utilities Menu – News.

Window Menu – Preferences (cont.)

Notification Setting – KSE Announcement Setting

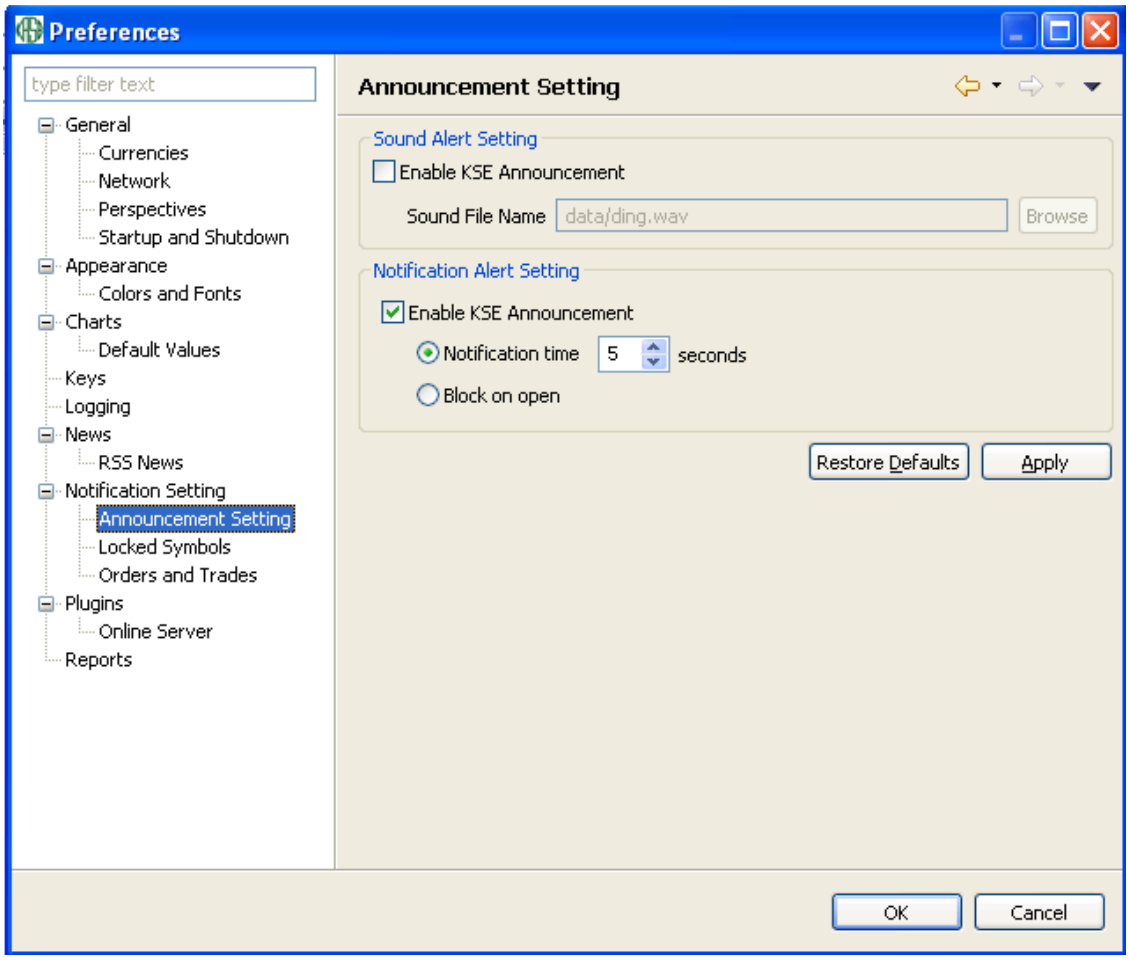


Figure 55: Preferences – Notification Setting – KSE Announcement Setting

Screen Explanation

Checkbox or Field	Function
Sound Alert Setting – Enable KSE Announcement	Plays a sound when KSE announcement is received
Sound File Name	Name of the sound file
Notification Alert Setting – Enable KSE Announcement	Enables KSE Announcement
Notification Time	KSE Announcement is updated in the number of seconds specified
Block on open	Blocks the Alert message when announcement is open

Window Menu – Preferences (cont.)

Notification Setting – Locked Symbols

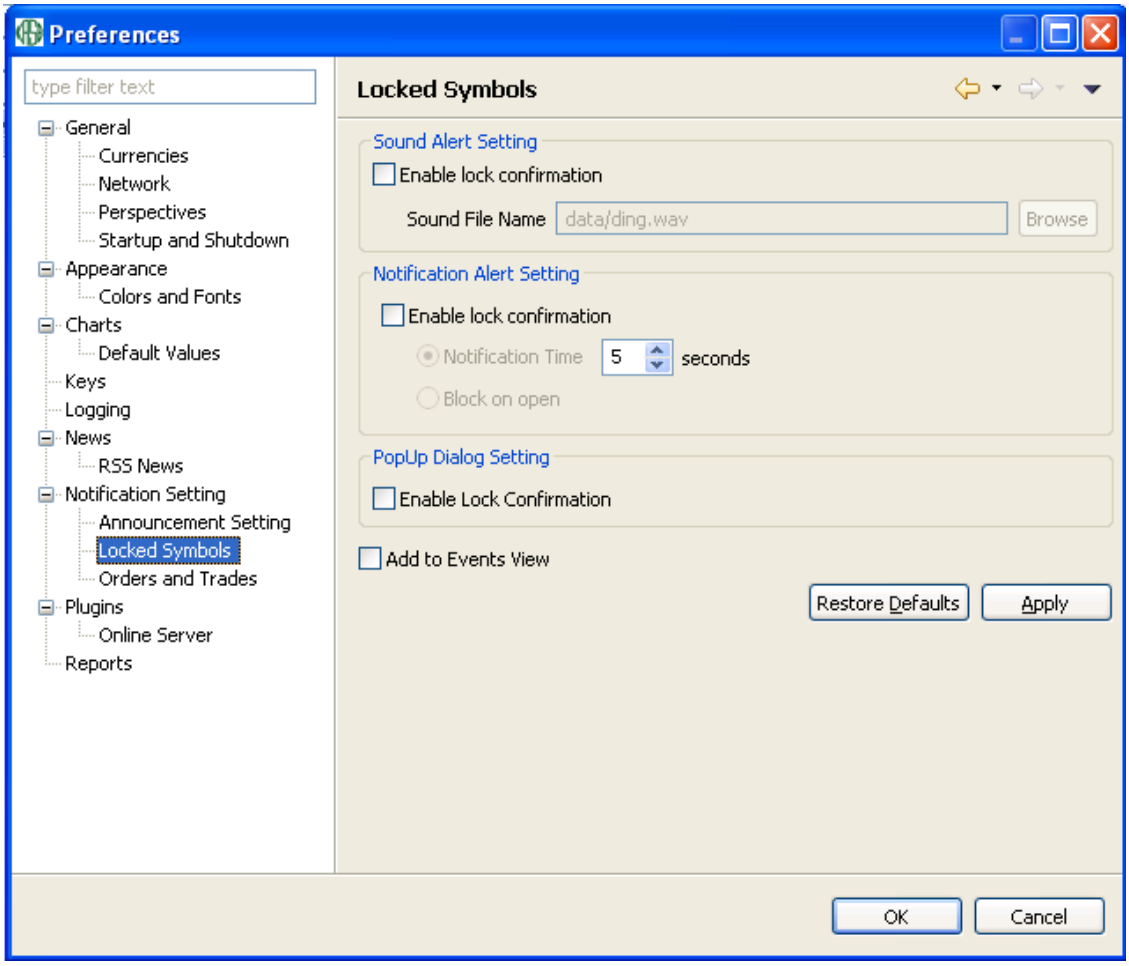


Figure 56: Preferences – Notification setting – Locked Symbols

Screen Explanation

Checkbox or Field	Function
Sound Alert Setting – Enable lock confirmation	Plays a sound when a symbol(s) is/are locked
Sound File Name	Name of the sound file
Notification Alert Setting – Enable lock confirmation	Enables confirmation of locked symbol(s)
Notification Time	Locked symbol(s) confirmation is/are updated in the number of seconds specified
Block on open	Blocks the Alert message when locked confirmation is open
Popup Dialog – Enable lock confirmation	Opens a popup dialog on locked symbol(s) confirmation
Add to Message Board	Adds lock confirmation message to the Message Board

Window Menu – Preferences (cont.)

Notification Setting - Orders and Trades

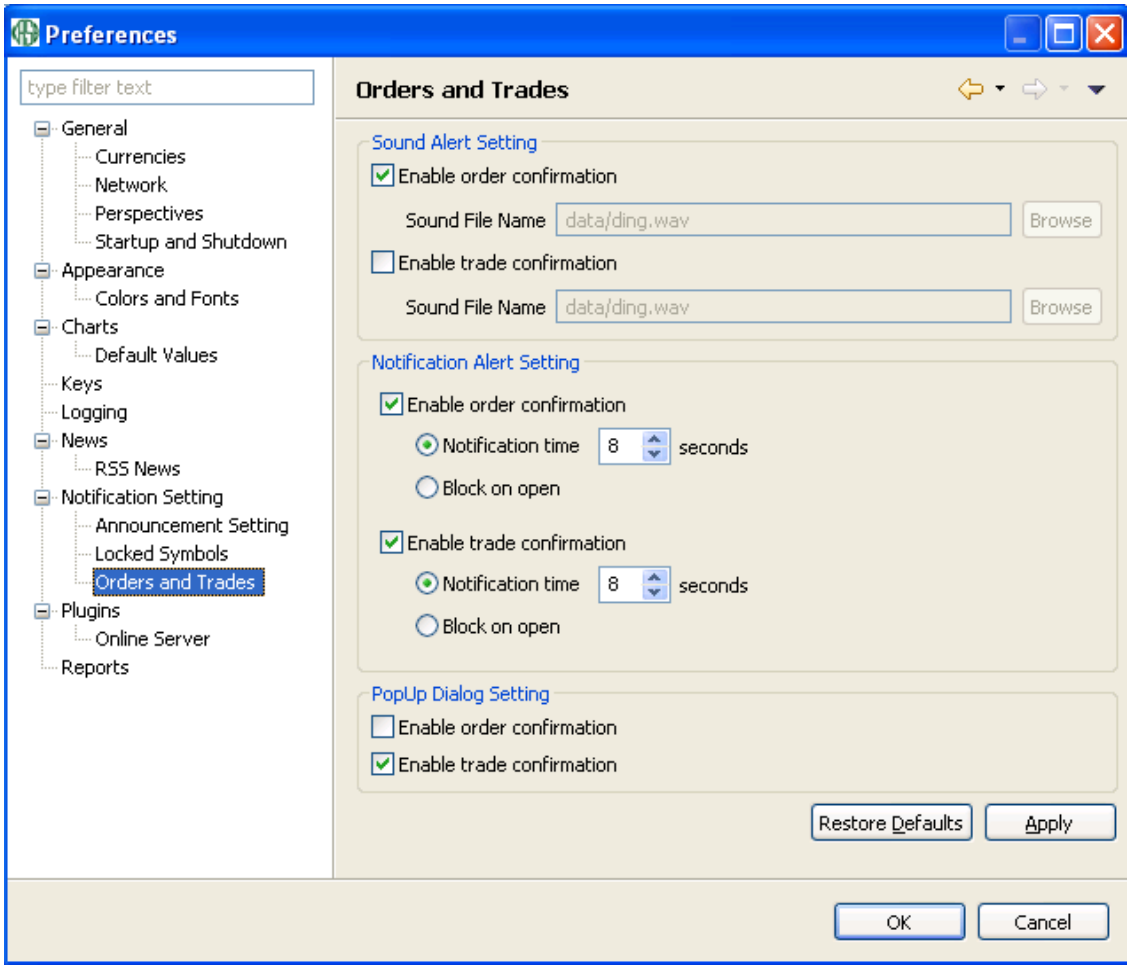


Figure 57: Preferences – Notification Setting – Orders and Trades

Screen Explanation

Checkbox or Field	Function
Sound Alert Setting – Enable order confirmation	Plays a sound when an order is placed
Sound File Name	Name of the sound file
Sound Alert Setting – Enable trade confirmation	Plays a sound when a trade is executed
Sound File Name	Name of the sound file
Notification Alert Setting – Enable order confirmation	Enables confirmation of locked symbol(s)
Notification Time	Order confirmation is updated to the client in the number of seconds specified
Block on open	Blocks the Alert message when order confirmation is open
Notification Alert Setting – Enable trade confirmation	Enables confirmation of trade
Notification Time	Trade confirmation is updated to the client in the number of seconds specified

Block on open	Blocks the Alert message when trade confirmation is open
Popup Dialog Setting – Enable order confirmation	Opens a popup dialog when an order is confirmed
Popup Dialog Setting – Enable trader confirmation	Open a popup dialog when a trade is confirmed

Window Menu – Preferences (cont.)

Plug-in – Report

User can view Reports in three different Fonts, Small, normal and Large. Simple follow the navigation and select the font size and apply changes.

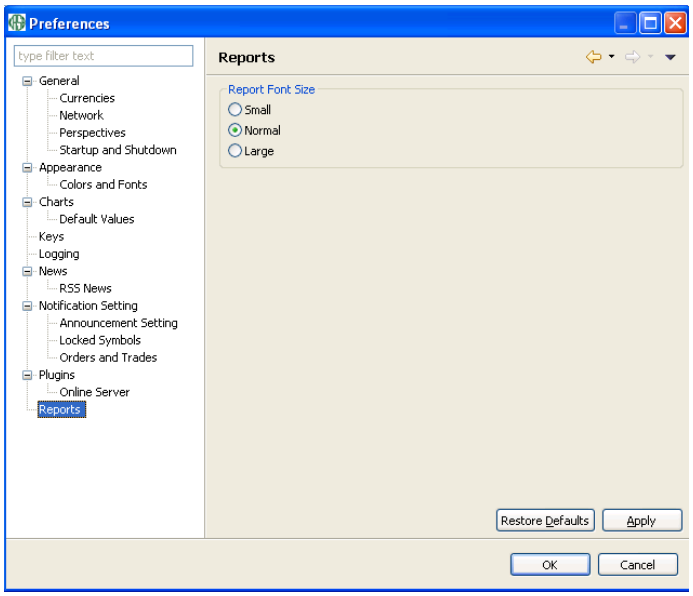


Figure 58: Preferences – Report

Screen Explanation

Checkbox or Field	Function
Small	If selected Small, Report will e displayed in small font size
Normal	If selected Normal than report will be displayed in normal font size
Large	If selected Large than , than report will be displayed in large font size
Apply	When pressed changes will be applied
Restore Default	If user wanted to continue with the default setting than

1.9 Help Menu

1.9.1Help Menu – Install New Software

Navigation:

Help > Install New Software

Terminal provides a feature to update existing software from the terminal website. Install New Software is one time effort and is not required if it is already configured.

In order to download software updates, you have to verify the Auto Update Server URL (http://www.serverurl.com/updatesite/) is configured in your software. At the place of server URL give URL of the server where updates are available.

Click on work “Work with the list of software sites”.

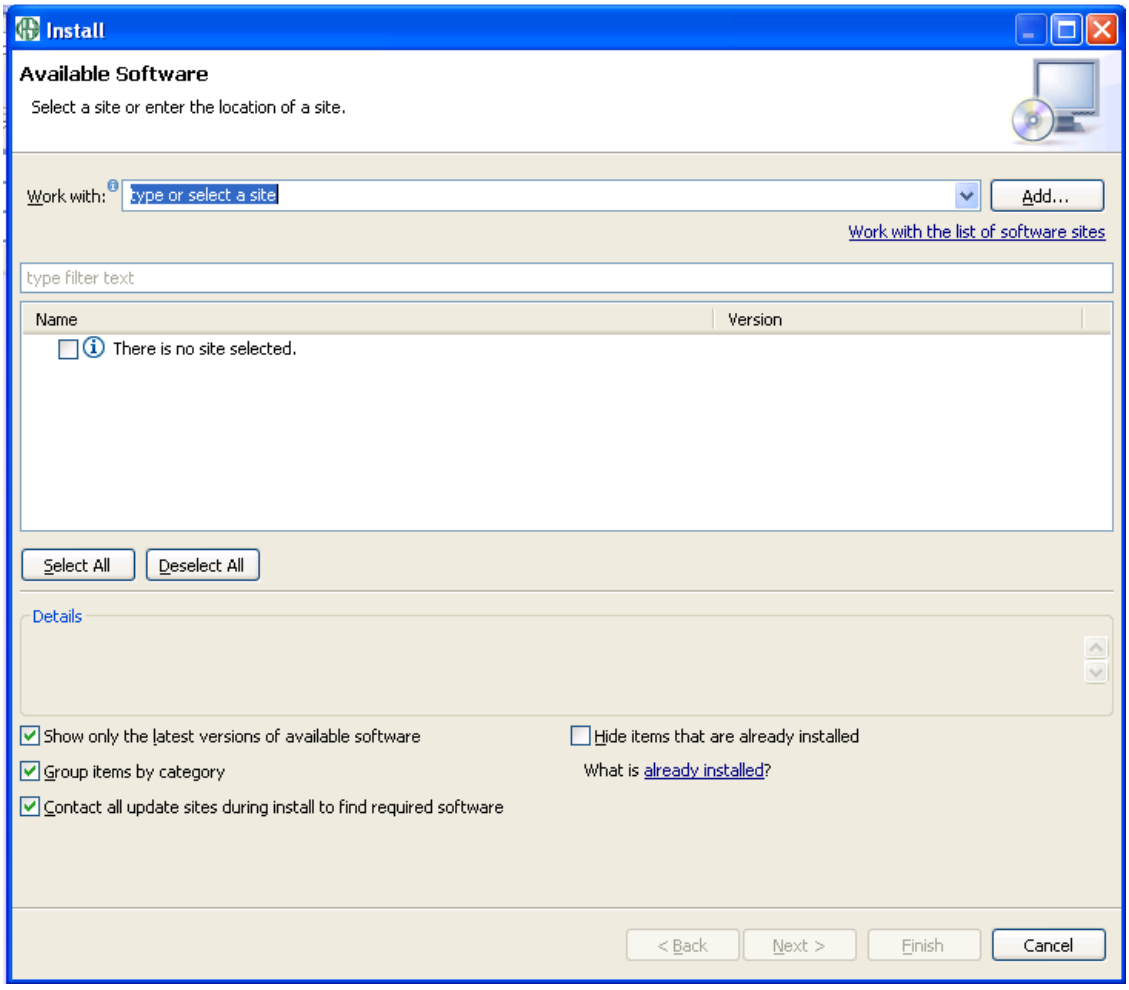


Figure 59: Install New Software

Help Menu – Install New Software

Following window appears.

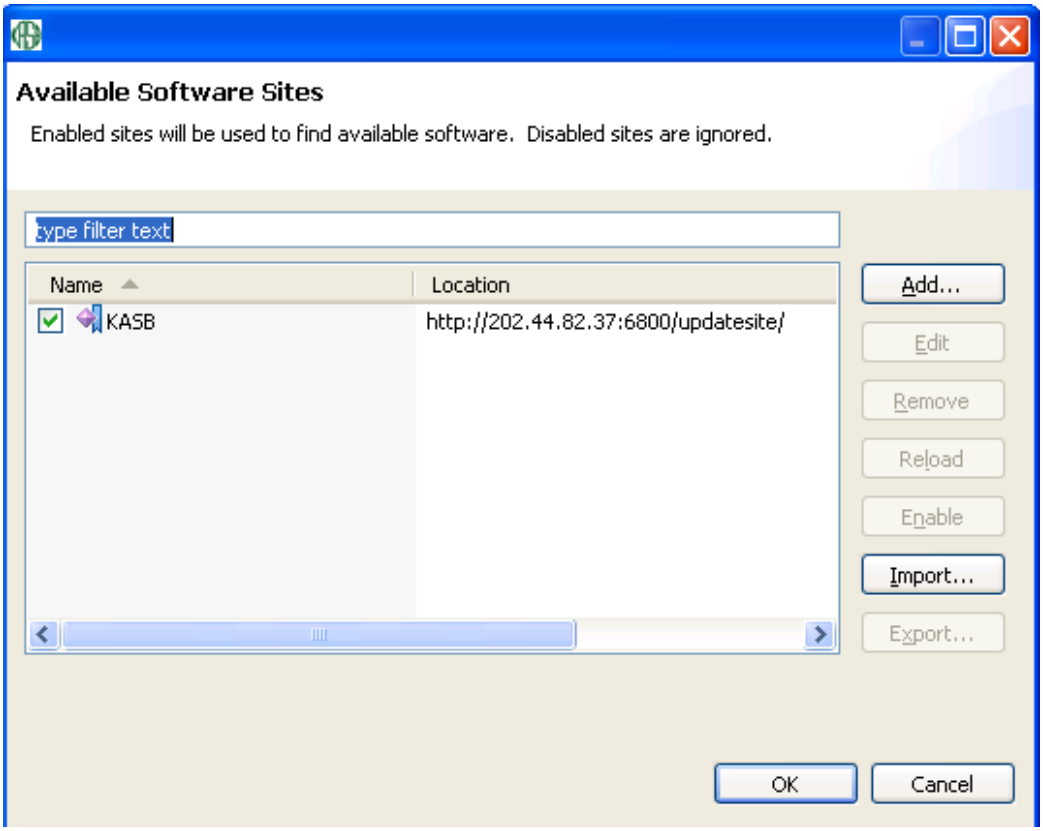


Figure 60: Add Software Site

Click on "Add" button to add new software site or click on edit button to edit existing software site. Following window appears when you click on "Add" button.

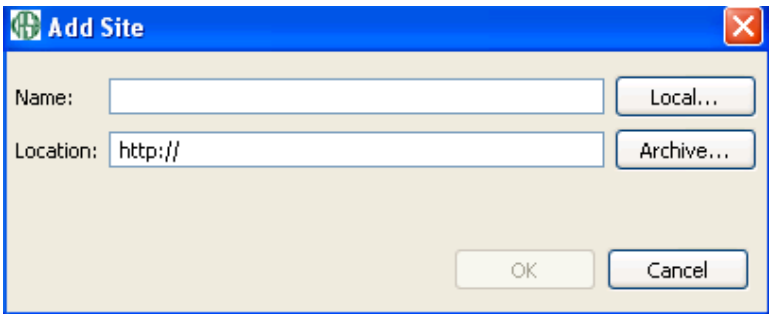


Figure 61: Install New Software

Screen Explanation

Checkbox or Field	Function
Name	Give name for the software site
Location	Give the location of the software site.

Help Menu – Install New Software

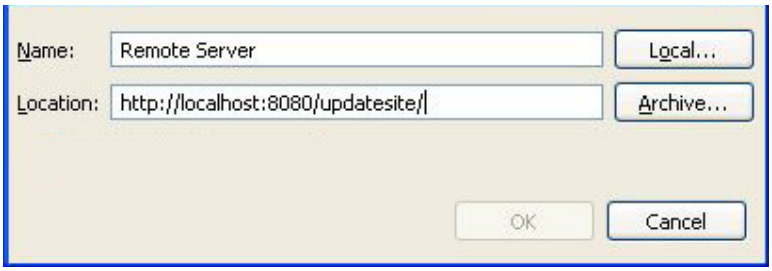


Figure 62: Give Update Site Location

After giving information press OK button.

If a software site is updated, press reload button. It will check whether the software site is available.

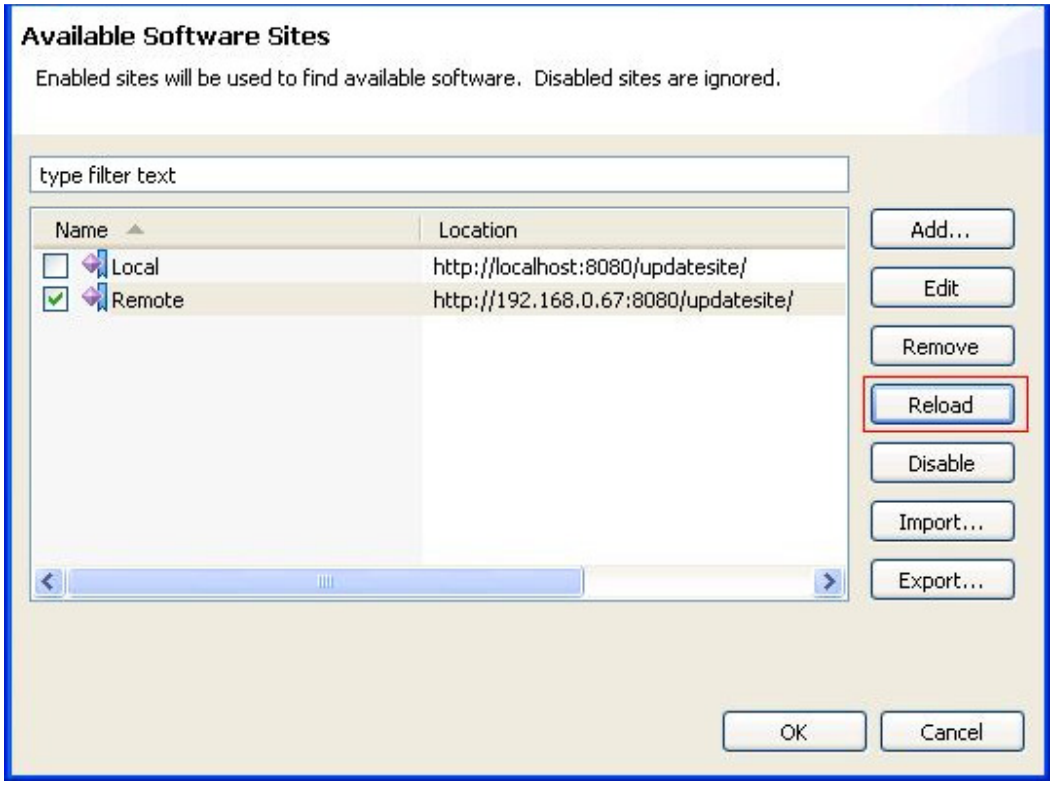


Figure 63: Reloading Software Site

Help Menu – Install New Software

If software site is unavailable following error appears.

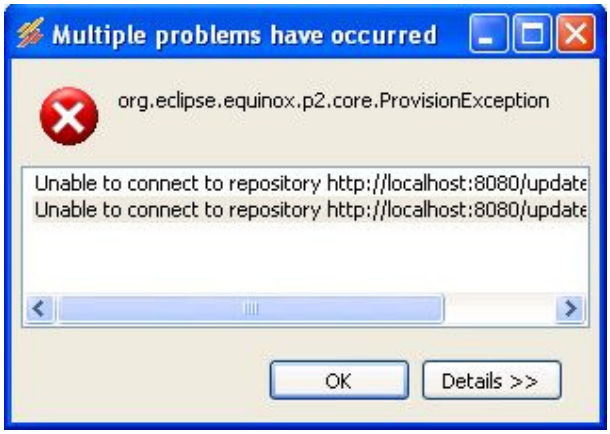


Figure 64: Software Site Unavailable

If there is a success message, you have configured the URL and you are ready to download the software updates.

1.9.2 Help Menu – Check for Updates

Navigation:

Help > Check for Updates

If the updates will available then you will see the following view.

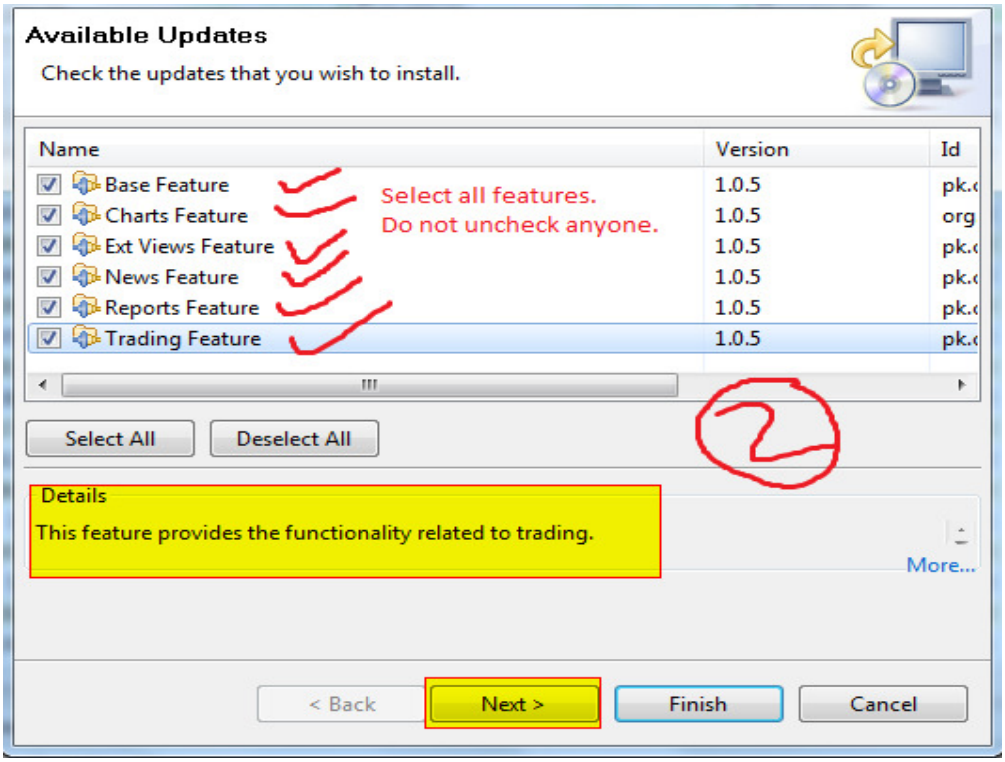


Figure 65: Update Software

Screen Explanation

Checkbox or Field	Function
Base Feature	A terminal feature to be updated
Charts Feature	A terminal feature to be updated
Ext View Feature	A terminal feature to be updated
News Feature	A terminal feature to be updated
Reports Feature	A terminal feature to be updated
Trading Feature	A terminal feature to be updated

Help Menu – Check for Updates (cont.)

Following window appears on pressing “Next” button.

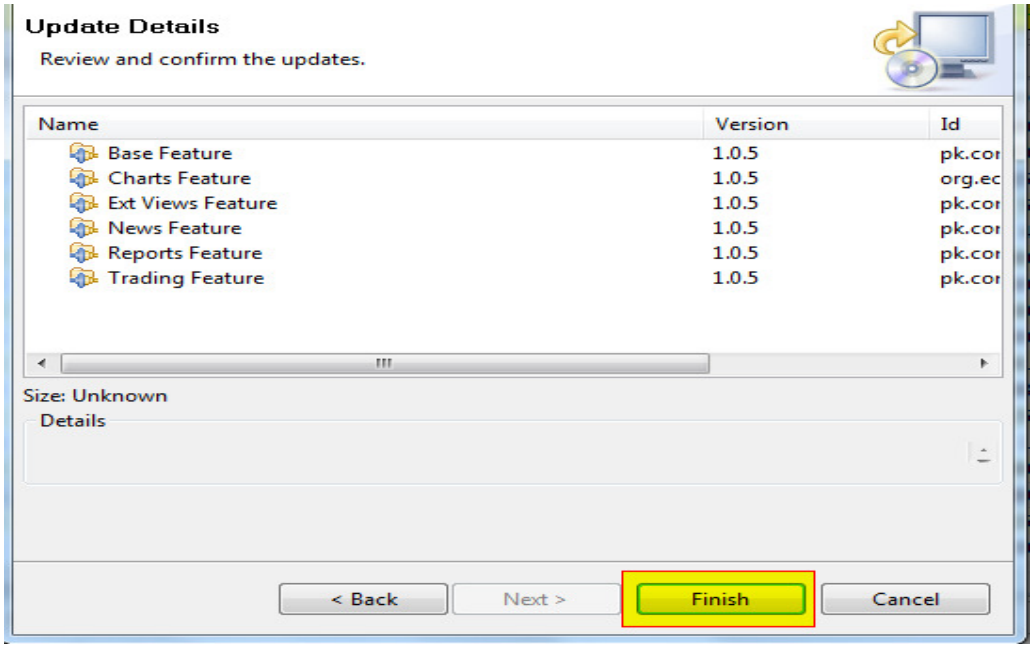


Figure 66: List of New Software Available

Now your software starts downloading updates from server you have configured in previous step.

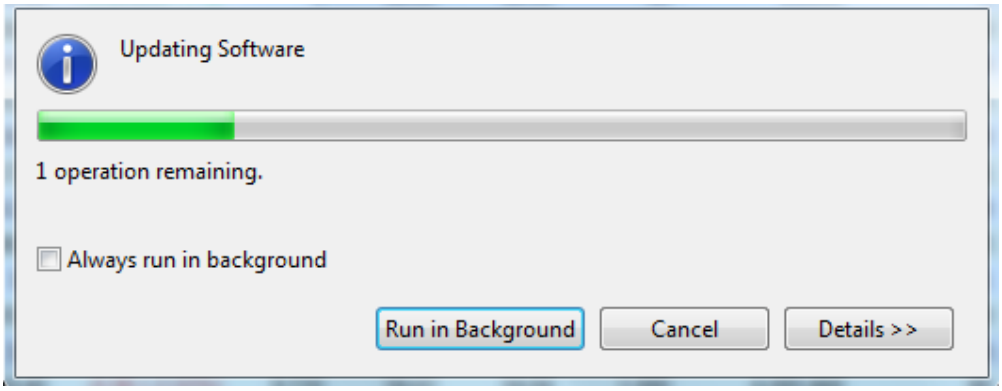


Figure 67: Updating Software

Note: Sometime it shows an error message while downloading the updates due to your internet connection speed but be patient and try it again (Check for updates) because ultimately it will download updates.

After downloading updates it will show warning message. (Just ignore it)

Help Menu – Check for Updates (cont.)

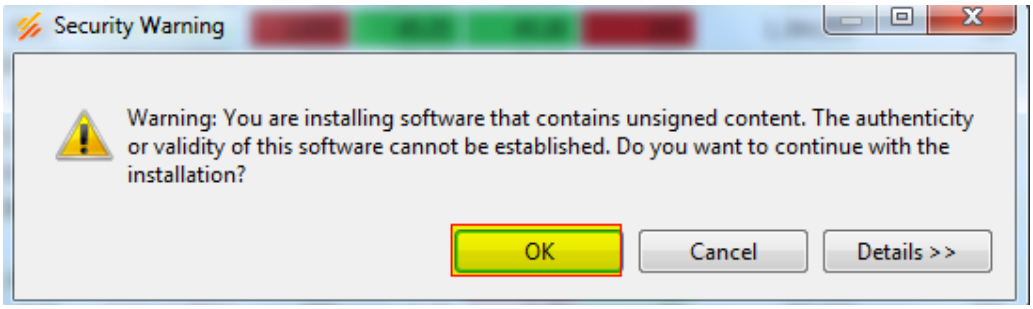

Security Warning
Warning: You are installing software that contains unsigned content. The authenticity or validity of this software cannot be established. Do you want to continue with the installation?
OK
Cancel
Details >>

Figure68: Warning – Unsigned Content

Now your software is updated. You have to restart terminal in order to view changes.

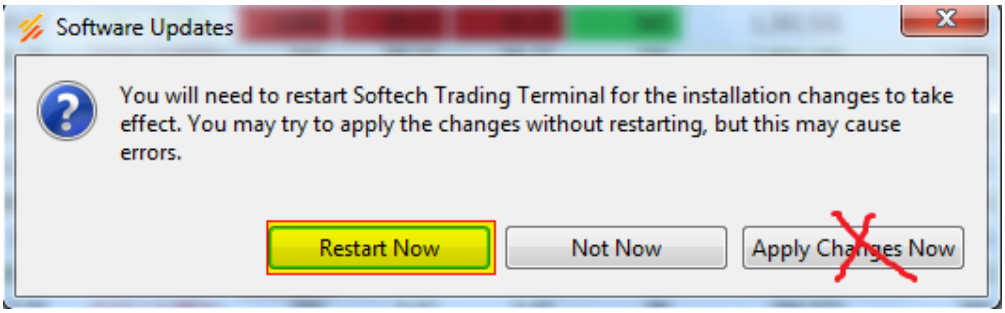

Software Updates
You will need to restart Softech Trading Terminal for the installation changes to take effect. You may try to apply the changes without restarting, but this may cause errors.
Restart Now
Not Now
Apply Changes Now

Figure 69: Restart Application

After restarting the terminal, updates will be incorporated in your terminal. To verify it again check for updates, you will see the following message that no updates were found.

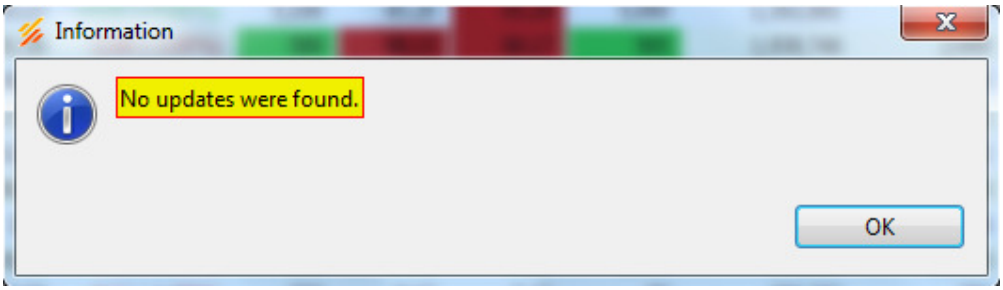


Figure 70: No Updated Available

1.10 Charts Perspective

Navigation:

Open Perspective Button > Others > Charts Perspective

Charts perspective is a complete perspective just like Trading Perspective. It enables user to view different statistics for analysis. Along with the plotting of graphs and charts, there are indicators tools and patterns available for analysis purpose.

Figure 71: Open a Chart

Chart will be displayed. This chart provides price statistics along with time. There is also a bar chart in the bottom that displays volume statistics along with time.

You can change the type of the chart by selecting the line displayed in the line chart. Right click it and click properties. Following popup window appears. Select Type of chart as Line, Bars, Candles or Histogram Area.

Charts Perspective (cont.)

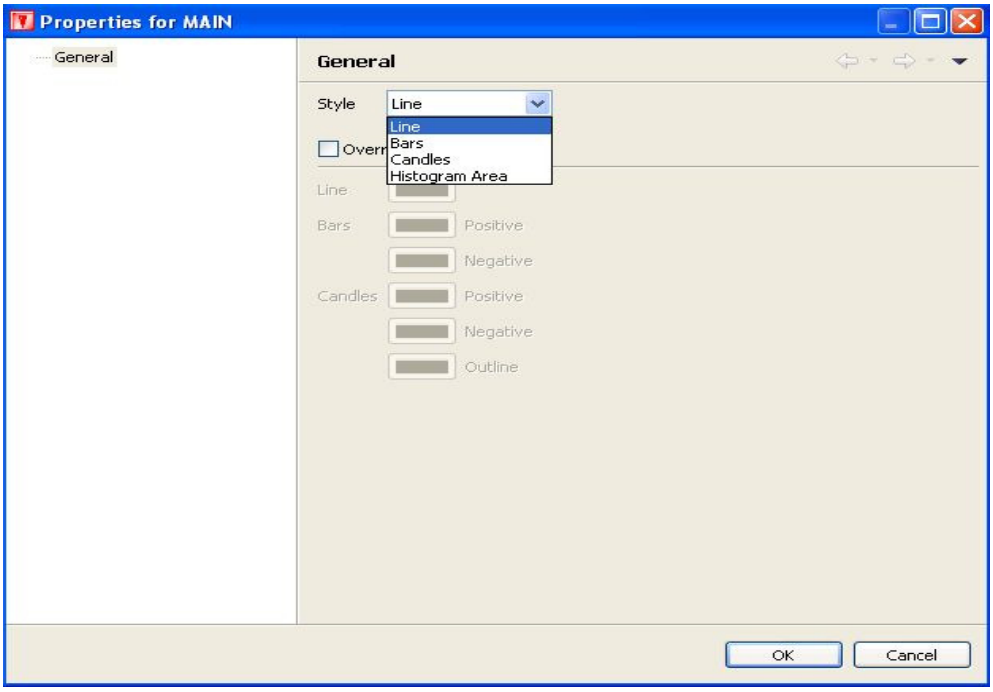


Figure 72: Change Type of Chart

You can also override the color theme by checking “Override color theme” and select color from the color palette for line bars or candles.

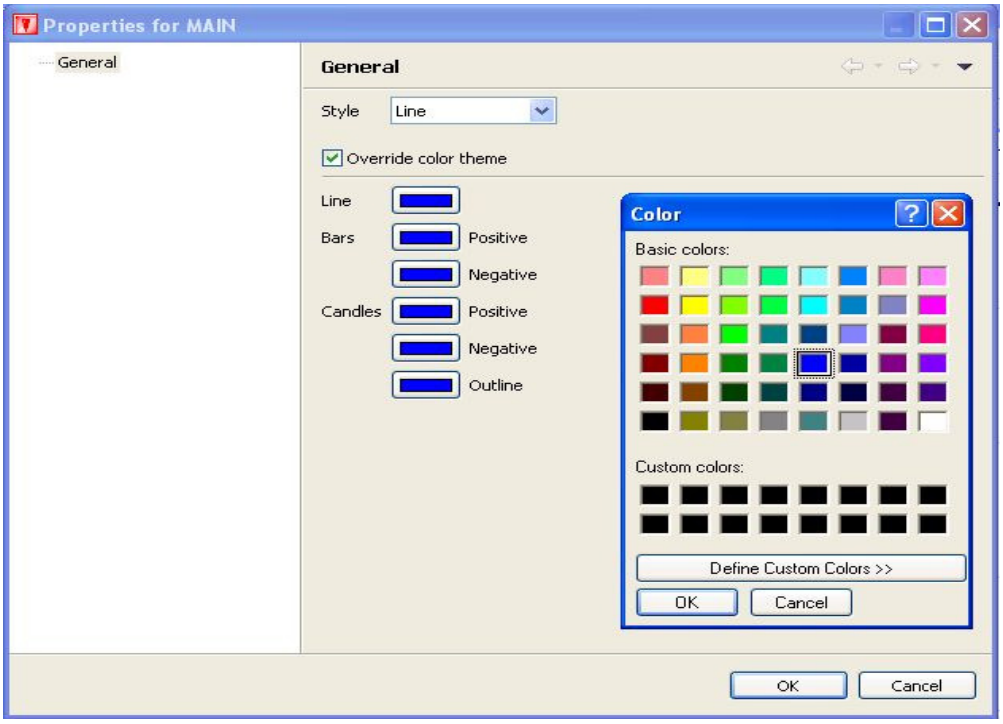


Figure 73: Change Type of Chart

You can view the charts for certain time duration by selecting history chart or intraday chart from the top right of charts view as encircled in the figure 71.

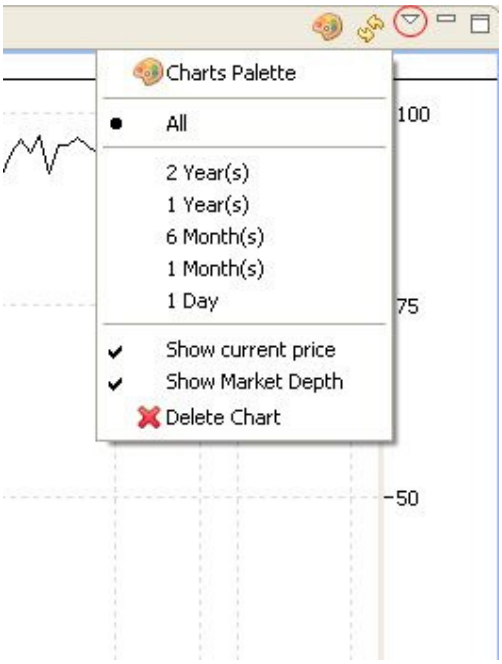


Figure 74: Change Type of Chart

Screen Explanation

Field	Function
All	Shows complete history
2 year	Shows 2 year data
1 year	Shows 1 year data
6 month	Shows 6 month data
1 month	Shows 1 month data
1 day	Show intraday chart
Show current price	Shows current price in the chart
Show Market Depth	Show Market Depth in the chart
Delete Chart	Deletes the chart

1.10.1 Charts Perspective - Top Indicators

Top Indicators provide different statistics as Bollinger Brands, Linear Regression, Moving Average, Trend Channel and Typical Price.

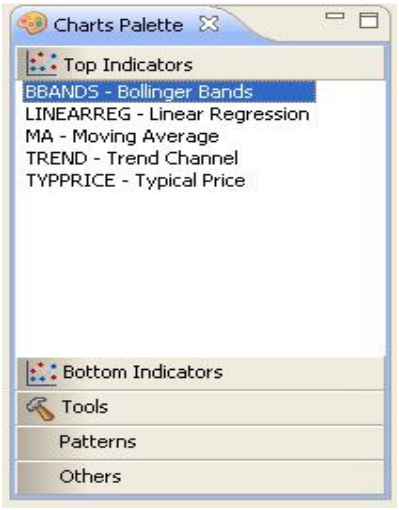


Figure 75: Top Indicators

To view a top indicator click on the indicator from the Charts Palette drag it and drop it onto the Chart view. Following window appears. In figure 72 and figure 73 Bollinger Brands is configured.

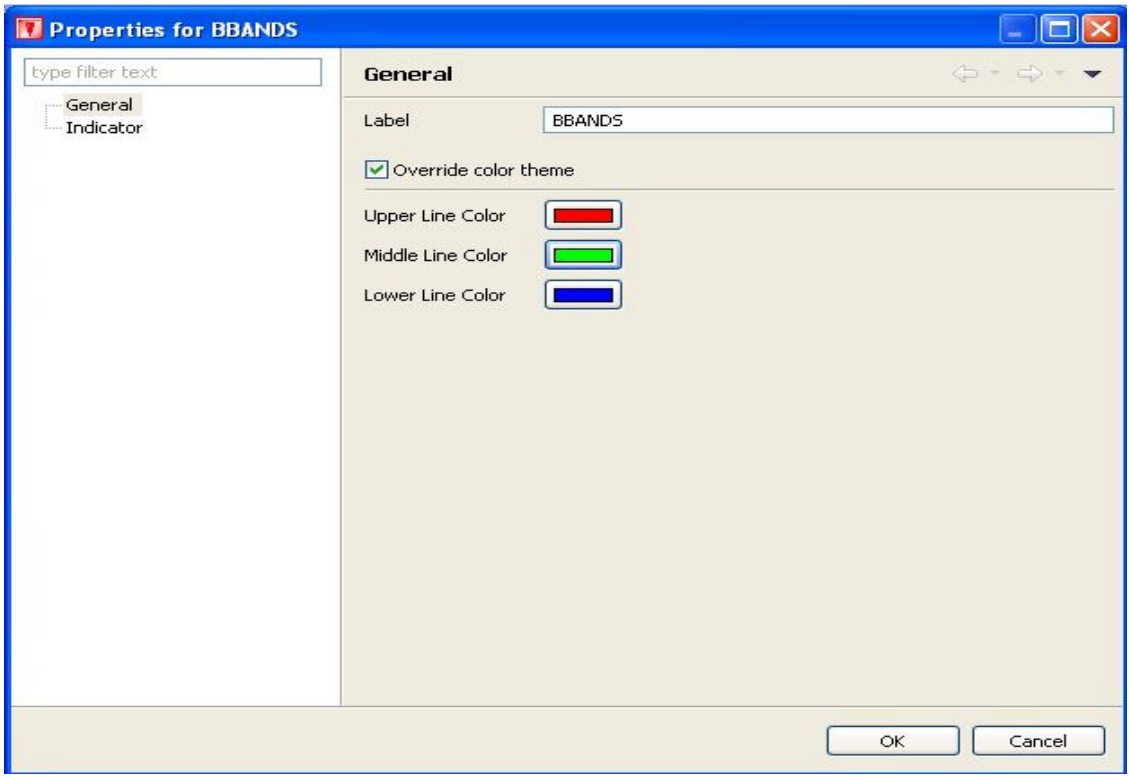


Figure 76: Bollinger Brands - General

Charts Perspective – Top Indicators (cont.)

Provide label in the label field. You can also check the "Override color theme" checkbox if you want to change the color of the chart.

You can also change the indicators by clicking the indicators link from the tree.

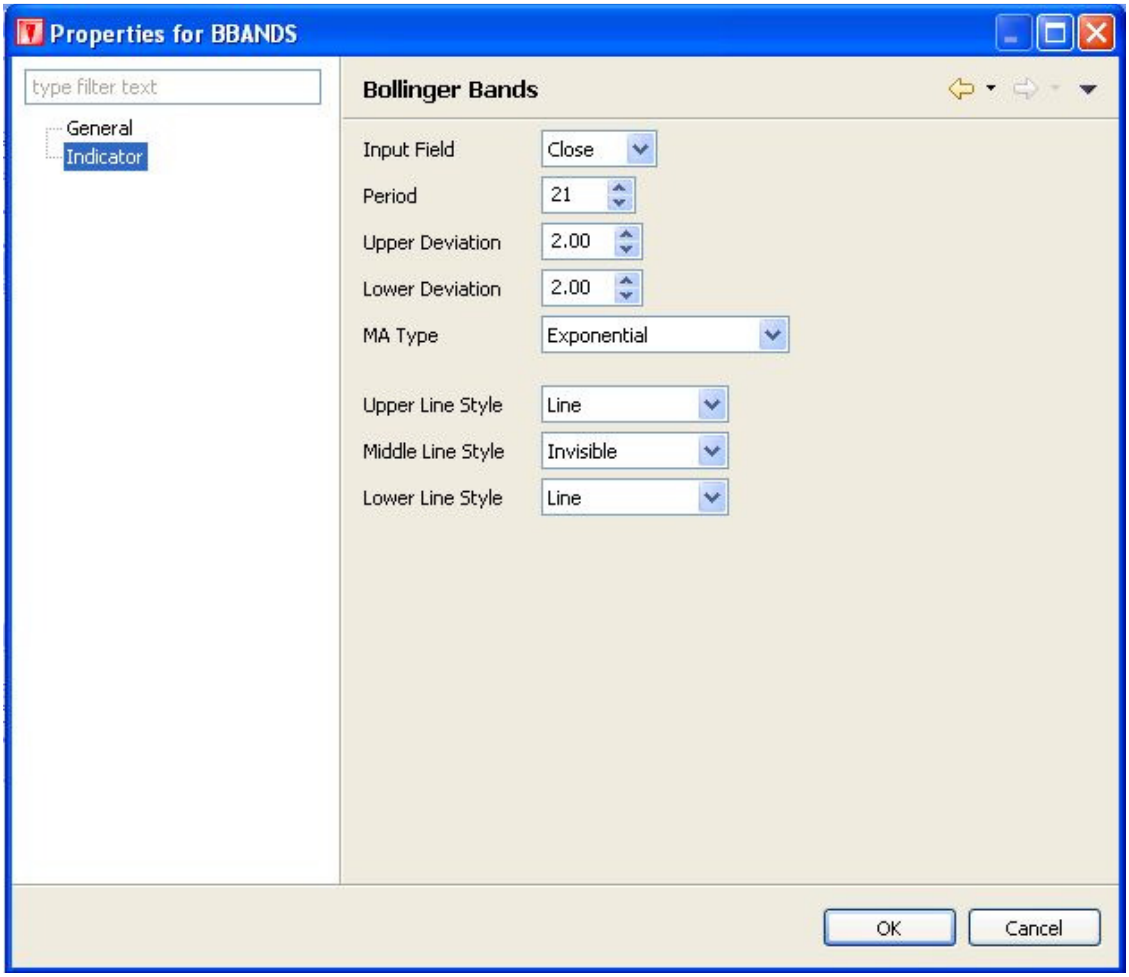


Figure 77: Bollinger Brands Indicators

Screen Explanation

Field	Function
Input Field	Input field can either be Close, High, Low, Open or Volume.
Period	Select the period
Upper Deviation	Select upper deviation
Lower Deviation	Select lower deviation
MA Type	Select MA Type
Upper Line Style	Select upper line style
Middle Line Style	Select middle like style
Lower Line Style	Select lower line style

Charts Perspective – Top Indicators (cont.)

Following chart appears.

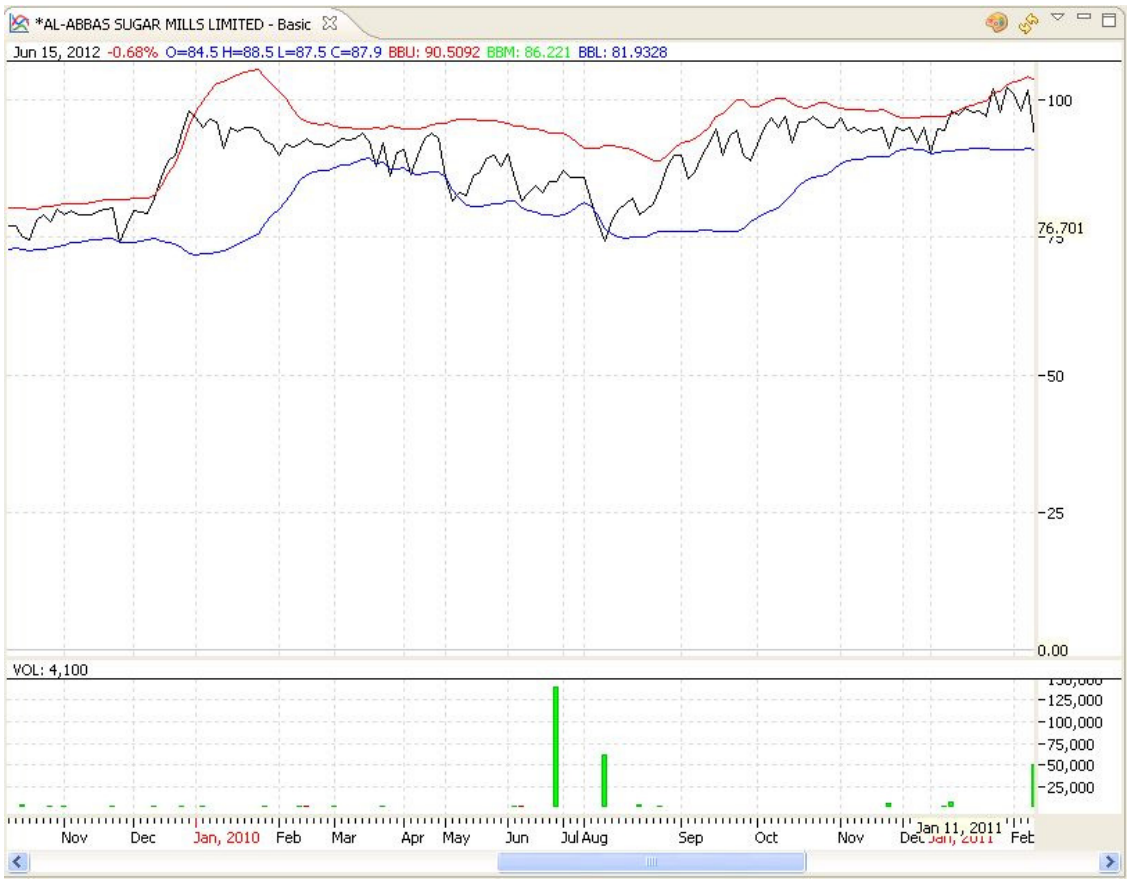


Figure 78: Bollinger Brands Indicators

Similarly other Top Indicators line Linear Regression, Moving Average, Trend Channel and Typical Price can be displayed.

1.10.2 Charts Perspective – Bottom Indicators

Bottom Indicators can display different statistics as Chaikin A/D Line, Chaikin A/D Oscillator, A/D Movement Index, etc.

Charts Palette
Top Indicators
Bottom Indicators
AD - Chaikin A/D Line
ADOSC - Chaikin A/D Oscillator
ADX - A/D Movement Index
ADXR - A/D Movement Index Rating
APO - Absolute Price Oscillator
AROON - Aroon
AROONOSC - Aroon Oscillator
ATR - Average True Range
AVGPRICE - Average Price
BOP - Balance Of Power
CCI - Commodity Channel Index
CMO - Chande Momentum Oscillator
DX - Directional Movement Index
MACD - M/A Convergence/Divergence
MFI - Money Flow Index
MOM - Momentum
NATR - Normalized Average True Range
OBV - On Balance Volume
PPO - Percentage Price Oscillator
ROC - Rate of Change
RSI - Relative Strength Index
SAR - Parabolic SAR
STOCHRSI - Stochastic RSI
STOCH - Stochastic
SUM - Summation
TRANGE - True Range
TRIX - 1-day ROC of a Triple Smooth EM
TSF - Time Series Forecast
ULTOSC - Ultimate Oscillator
VAR - Variance
Tools
Patterns
Others

Figure 79: Bottom Indicators

Charts Perspective – Bottom Indicators (cont.)

To view a top indicator click on the indicator from the Charts Palette drag it and drop it onto the Chart view. Following window appears. In figure 77 and figure 78Chaikin A/D Line is configured and displayed.

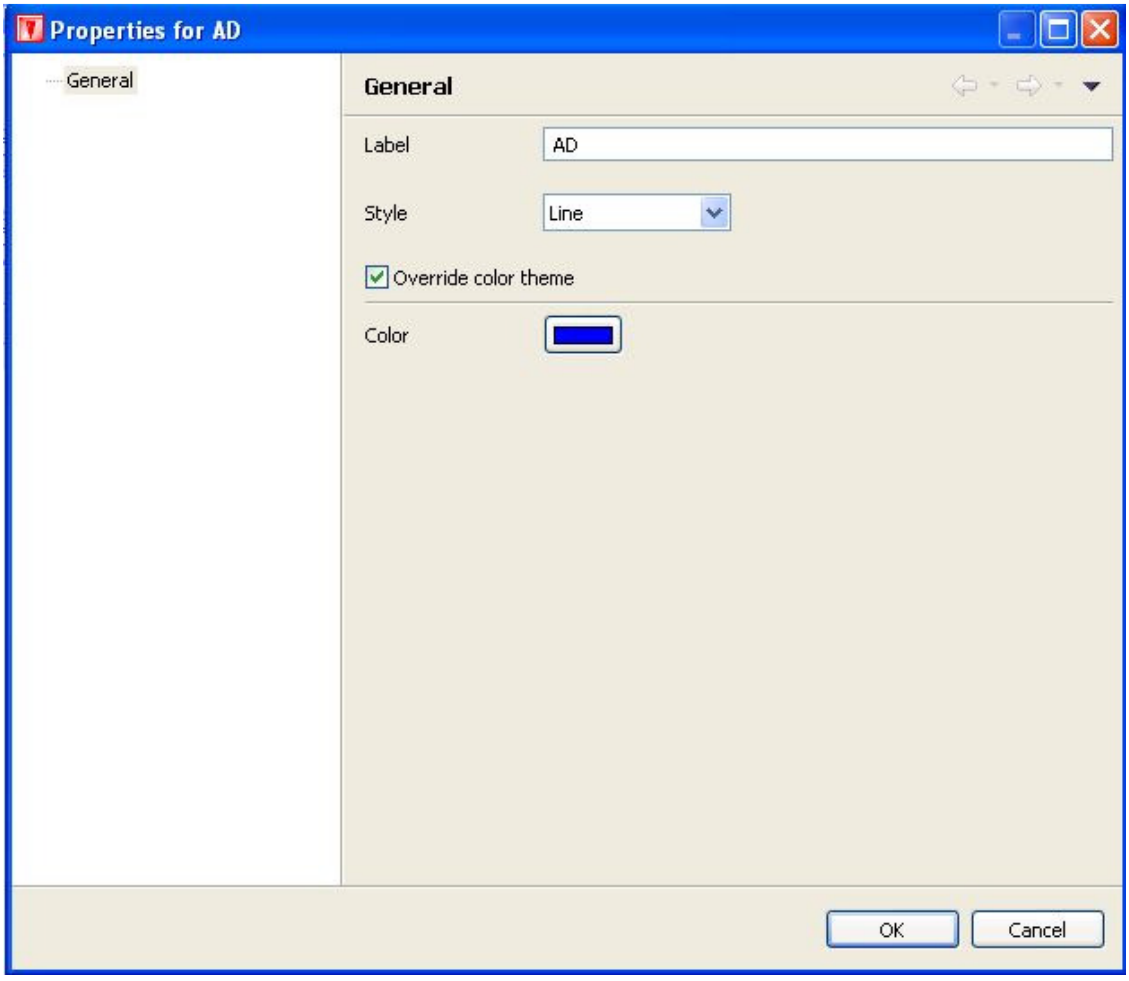


Figure 80: Bottom Indicators

Give the label and Style. Check “Override color theme” if you want to change color of the line, and press OK. Following chart appears.

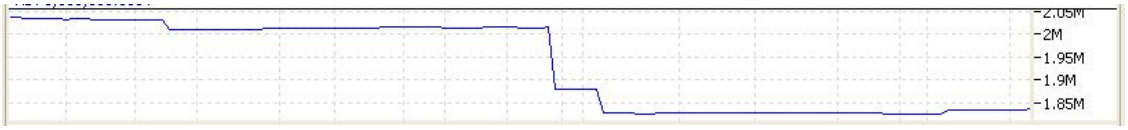


Figure 81: Bottom Indicators

Similarly other Bottom Indicator can be displayed.

1.10.3 Charts Perspective – Tools

FanLine, FiboArc, FiboLine and Line tools are available in the terminal.

To draw a FanLine, drag FanLine from charts palette – tools and drop it onto Charts view. FanLine is displayed in the chart.

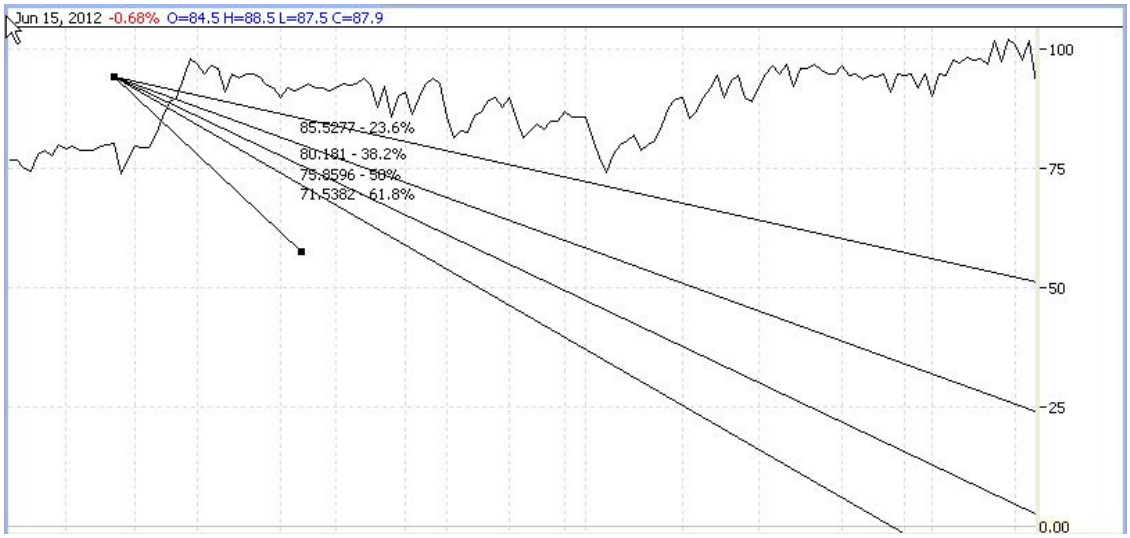


Figure 82: FanLine

To draw a FiboArc, drag FiboArc from charts palette – tools and drop it onto Charts view. FiboArc is displayed in the chart.

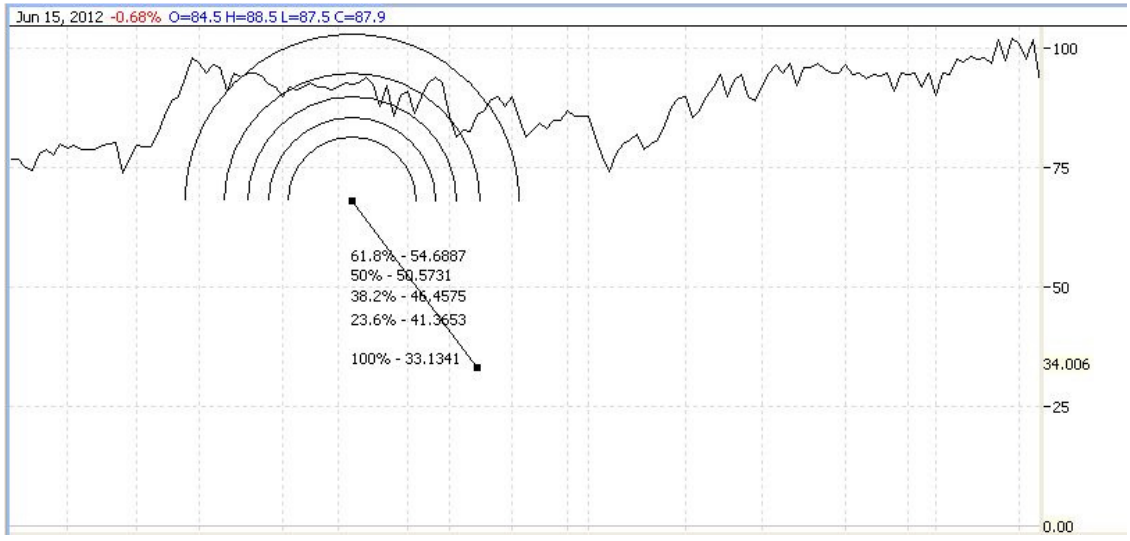


Figure83: FiboArc

Charts Perspective – Tools (cont.)

To draw a FiboLine, drag FiboLine from charts palette – tools and drop it onto Charts view. FiboLine is displayed in the chart.

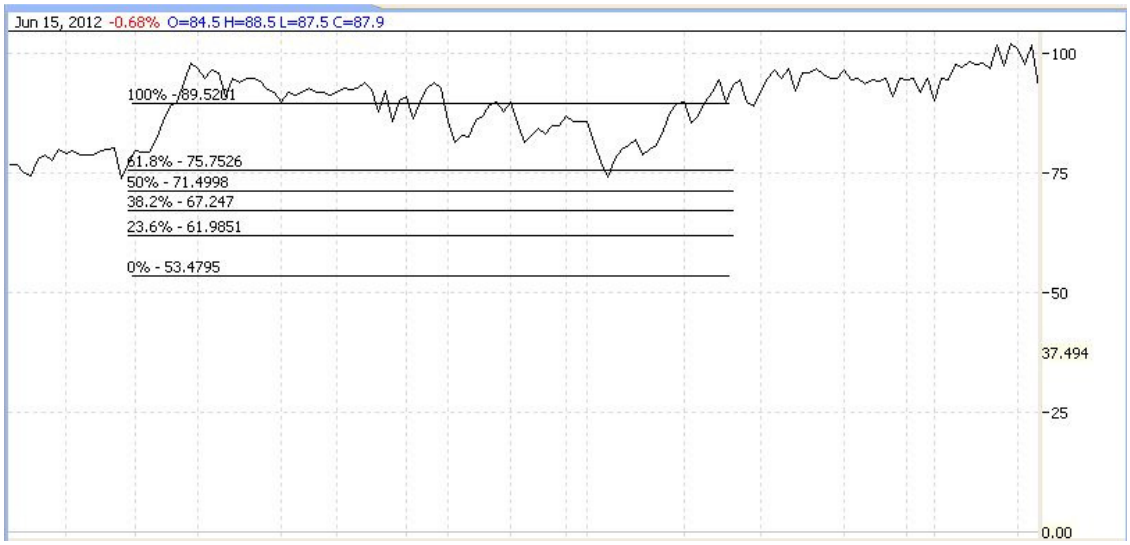


Figure 84: FiboLine

To draw a simple Line, drag Line from charts palette – tools and drop it onto Charts view. Line is displayed in the chart.

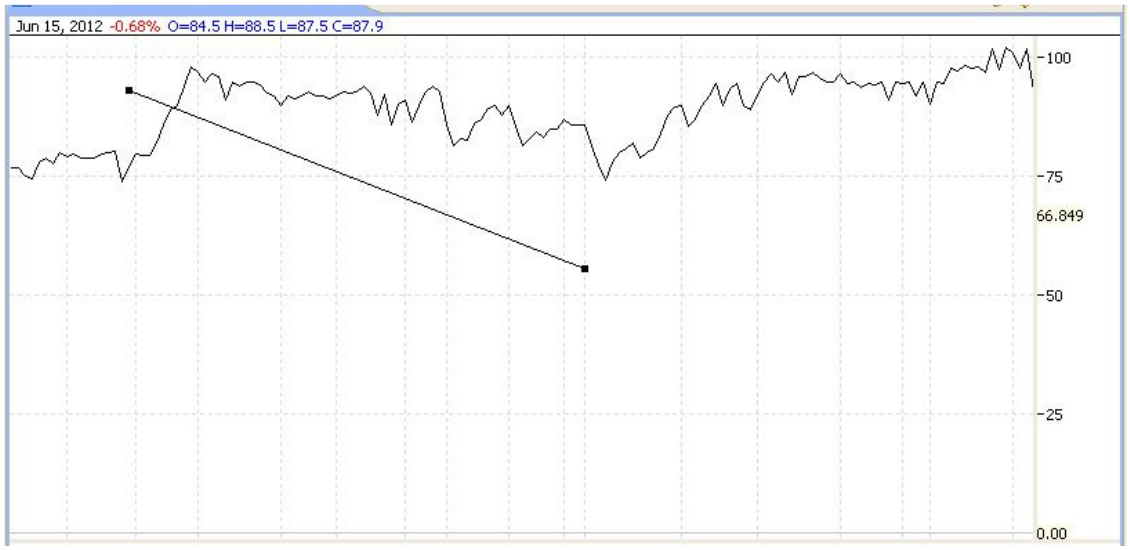


Figure 85: FiboLine

1.10.4Charts Perspective – Patterns

Different Patterns can be displayed by dragging it and dropping it onto the Charts view. Following patterns are available.

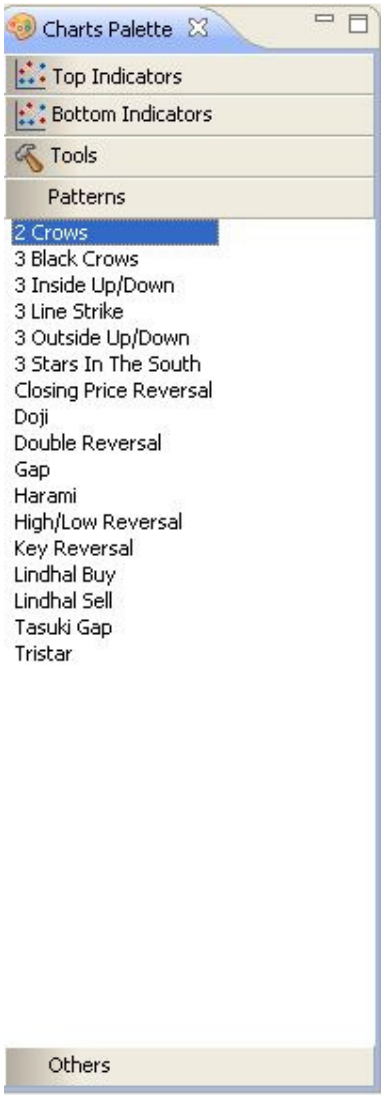


Figure 86: Patterns

Charts Perspective – Patterns (cont.)

For example, for viewing Closing Price Reversal drag it and drop it onto the Charts view. It will be displayed as shown in figure 84.

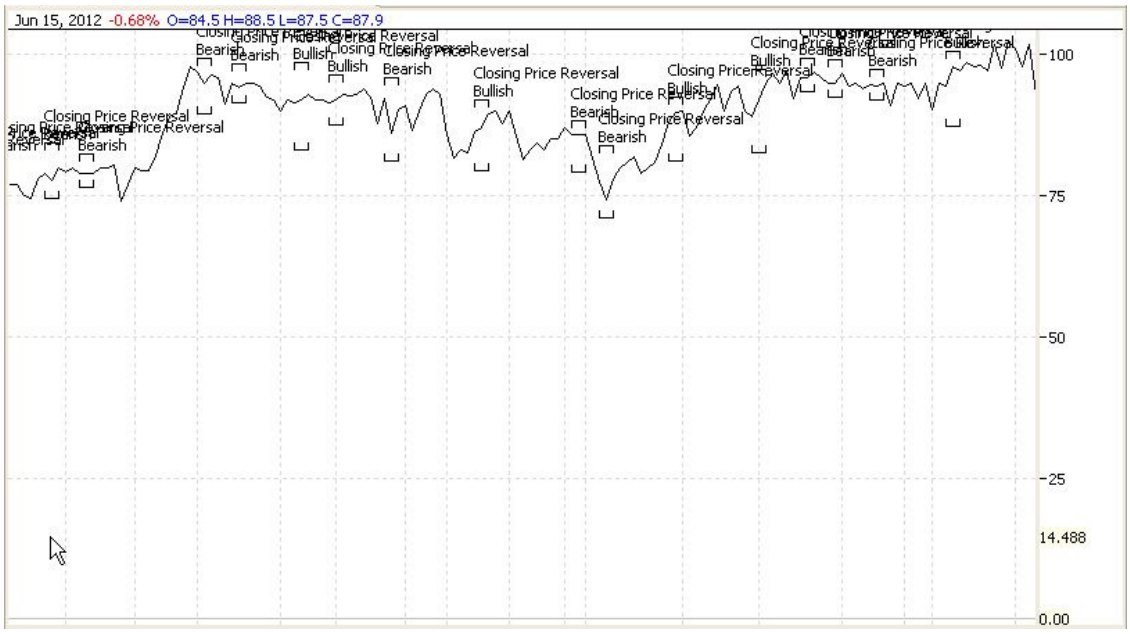


Figure87: Patterns

1.10.5Charts Perspective – Others

In others volume can be viewed.

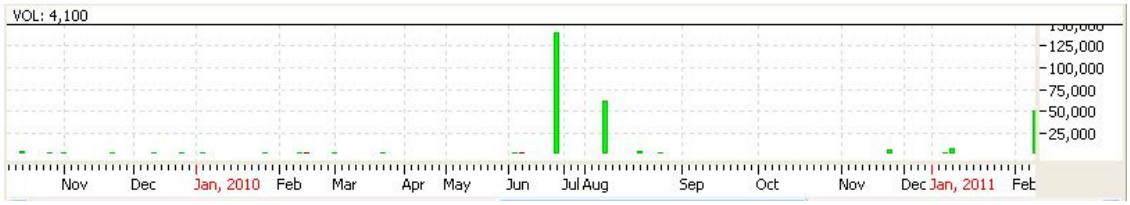


Figure 88: Volume

1.10.6 Charts Zoom Options

User has provided with the option to Zoom in and Zoom out charts of any symbol as required. Zoon in and Zoom out options is available below the top menu bar as shown in the picture below. User is simply required to select the symbol from right side and select chart view. Once chart view displayed it can be either Zoom in or Zoom out. Follow the highlighted area.

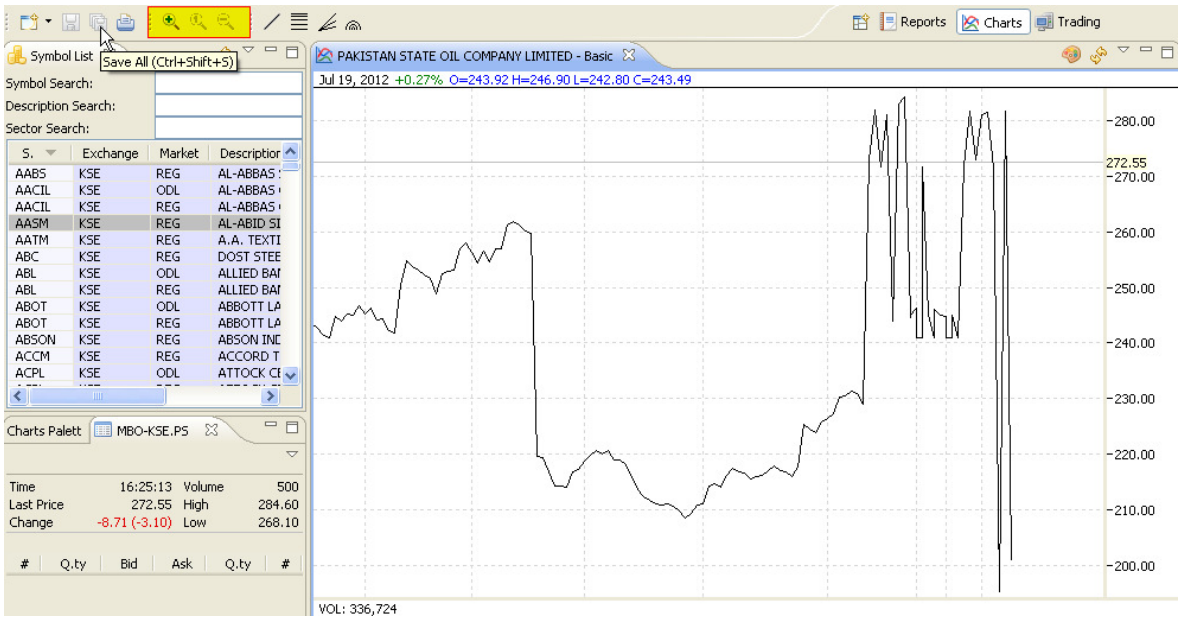


Figure: 89:Chart Zoom In and Zoom out option

2 Transactional

2.1 Trading Menu

2.1.1 Trading Menu – Orders

Navigation:

Trading > Orders or Ctrl+O(shortcut)

All orders placed are available in the orders menu. All order are available in the All tab, where as Pending, Filled, Cancelled and Rejected orders are available in the corresponding tabs.

Exchange	Market	Symbol	Account	Order Id	Volume	Price	Filled Vol	Rem Vol	Side	Status	Type	Time	Expire
KSE	REG	PSO	RMS01	9554	100	500.00	100	0	SELL	Filled	NONE	02:55:29	N/A
KSE	REG	PSO	RMS01	9561	10	252.13	10	0	SELL	Filled	NONE	03:03:07	N/A
KSE	REG	PSO	RMS01	9560	10	252.13	10	0	BUY	Filled	NONE	03:03:07	N/A
KSE	REG	PSO	RMS01	9559	1,000	1.00	1,000	0	SELL	Filled	NONE	02:56:42	N/A
KSE	REG	PSO	RMS01	9558	1,000	1.00	1,000	0	BUY	Filled	NONE	02:56:42	N/A
KSE	REG	PSO	RMS01	9557	1	1,000...	1	0	SELL	Filled	NONE	02:56:04	N/A
KSE	REG	PSO	RMS01	9556	1	1,000...	1	0	BUY	Filled	NONE	02:56:04	N/A
KSE	REG	PSO	RMS01	9555	100	500.00	100	0	BUY	Filled	NONE	02:55:29	N/A
KSE	REG	PSO	RMS01	9549	100	281.00	0	100	BUY	Queued	LIMIT	03:05:12	08/03...

Figure 90: Orders

2.1.2 Trading Menu – Orders Summary

Navigation:

Trading > Orders Summary or Ctrl++Shift+O (shortcut)

In orders summary all buy and sell orders placed are available along with the total and grand total of all buy and sell orders.

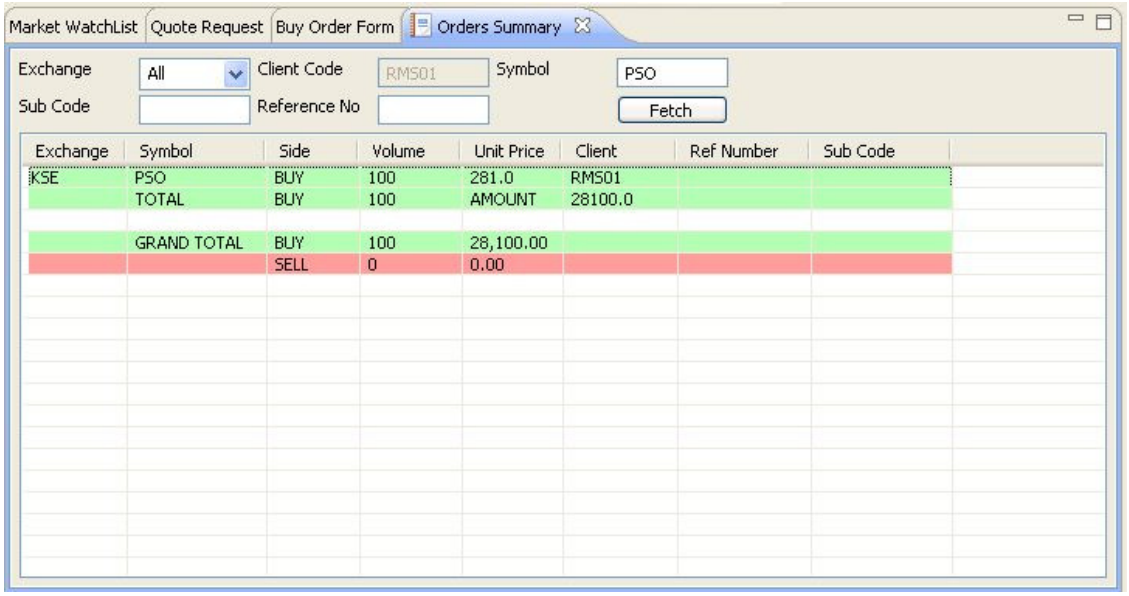


Figure 91: Orders Summary

Screen Explanation

Checkbox or Field	Function
Exchange	Select name of the exchange
Client Code	Give Clint code of the client placing the order(s)
Symbol	Give Symbol for which order(s) is/are placed
Sub Code	Give Sub code of the order(s)
Reference Number	Give Reference number of the order(s)

2.1.3 Trading Menu – Trades

Navigation:

Trading - Trades or Ctrl+R (shortcut)

All executed trades are available here.

Exchange	Market	Symbol	Account	TradeNumber	Order Id	Volume	Price	Side	Avg. Price	Time
KSE	REG	PSO	RMS01	7128	9555	100	50...	BUY	500.00	02:...
KSE	REG	PSO	RMS01	7128	9554	100	50...	SE...	500.00	02:...
KSE	REG	PSO	RMS01	7131	9557	1	1,0...	SE...	1,000.00	02:...
KSE	REG	PSO	RMS01	7131	9556	1	1,0...	BUY	1,000.00	02:...
KSE	REG	PSO	RMS01	7134	9558	1,000	1.00	BUY	1.00	02:...
KSE	REG	PSO	RMS01	7134	9559	1,000	1.00	SE...	1.00	02:...
KSE	REG	PSO	RMS01	7137	9561	10	25...	SE...	252.13	03:...
KSE	REG	PSO	RMS01	7137	9560	10	25...	BUY	252.13	03:...

Figure 92: Trades

2.1.4 Trading Menu – Trades Summary

Navigation:

Trading > Trades Summary or Ctrl+Shift+R (shortcut)

Summary of all executed trades is available here. A search feature is available to narrow down the search.

Market WatchList
Quote Request
Modify Order Form
Trades Summary
Orders Summary
Exchange
All
Client Code
RMS01
Symbol
Fetch
Sub Code
Reference No
From Time
09:00:00
To Time
Exchange Symbol Side Volume Unit Price Client Ref Number Sub Code Trade Time
KSE PSO BUY 100 500.0 RMS01 11:55:29
KSE PSO BUY 1 1000.0 RMS01 11:56:04
KSE PSO BUY 1000 1.0 RMS01 11:56:42
KSE PSO BUY 10 252.13 RMS01 12:03:07
KSE PSO SELL 100 500.0 RMS01 11:55:29
KSE PSO SELL 1 1000.0 RMS01 11:56:04
KSE PSO SELL 1000 1.0 RMS01 11:56:42
KSE PSO SELL 10 252.13 RMS01 12:03:07
TOTAL BUY 1111 AVERAGE 438.28 W. Avg 49.07
SELL 1111 AVERAGE 438.28 W. Avg 49.07
GRAND T... BUY 1111 54,521.30
SELL 1111 54,521.30

Figure 93: Trades Summary

Screen Explanation

Checkbox or Field	Function
Exchange	Select name of the exchange
Client Code	Give Clint code of the client placing the order(s)
Symbol	Give Symbol for which order(s) has/have been placed
Sub Code	Give Sub code of the order(s)
Reference Number	Give Reference number of the order(s)
From Date	Give Starting time after which order has been placed
To Date	Give Ending time before which order has been placed

2.1.5 Trading Menu – Buy Order Form

Navigation:

Trading > Buy Order Form or F4 (shortcut)

Buy order form is used to place a buy order.

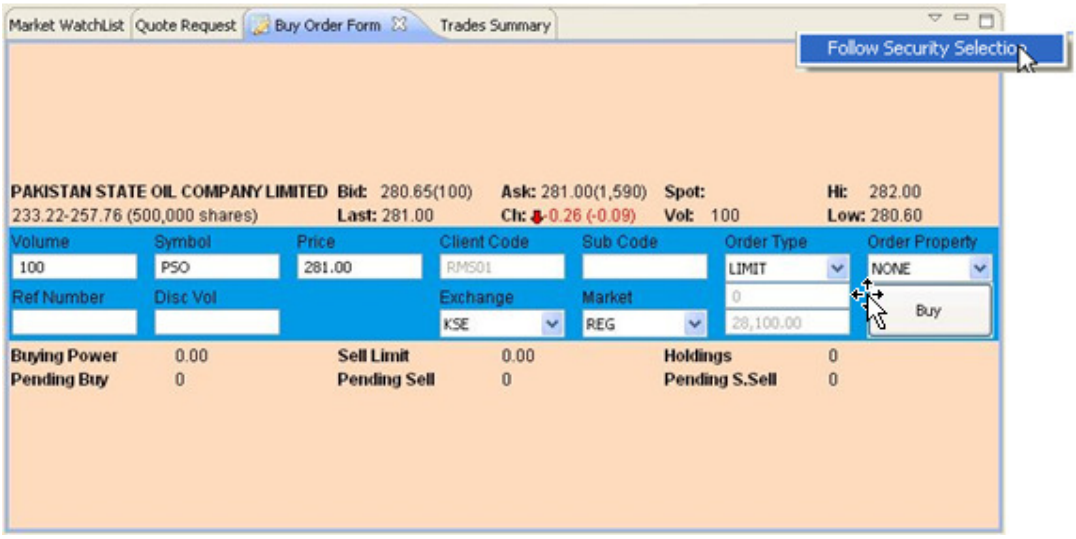


Figure 94: Buy Order Form

This is new functionality provided to the user. If this option markets than as user change the security, credential of the selected security will also be changed in Sell Order Form.

Screen Explanation

Checkbox or Field	Function
Volume	Give volume of the order
Symbol	Give symbol
Price	Give price for the symbol
Client Code	Give client code if trader is logged in. If client is logged in client code appears and is disabled.
Sub Code	Give sub code
Order Type	Give order type as LIMIT, STOP LOSS, MIT, S/L Market, Market or Short Sell
Order Property	Give order property as NONE or AON
Reference Number	Give reference number for the order
Disc Volume	Give disc volume
Exchange	Give exchange in which order is placed
Market	Give market whether REG, COT, FUT, PRV, ODL, NCCSF, NCDFUT

Trading Menu – Buy Order Form

On pressing the button buy order confirmation screen appears.

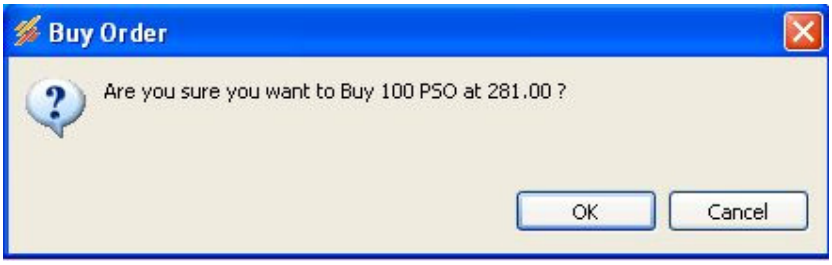


Figure95: Order Confirmation Prompt

Press OK button to place the order.

Following notification appears when order is successfully placed.

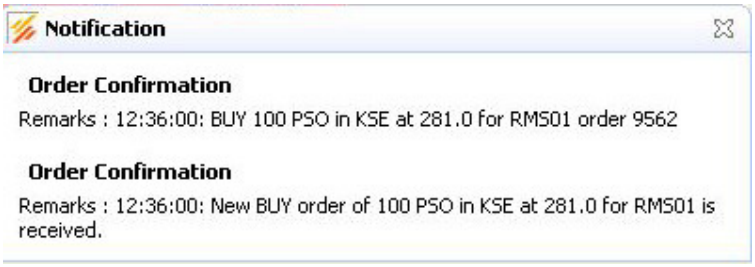

Notification
Order Confirmation
Remarks : 12:36:00: BUY 100 PSO in KSE at 281.0 for RMS01 order 9562
Order Confirmation
Remarks : 12:36:00: New BUY order of 100 PSO in KSE at 281.0 for RMS01 is received.

Figure 96: Order Confirmation

Order starts appearing in the orders view.

2.1.6 Trading Menu – Sell Order Form

Navigation:

Trading > Sell Order or F5(shortcut)

Sell Order form is used to place a sell order.

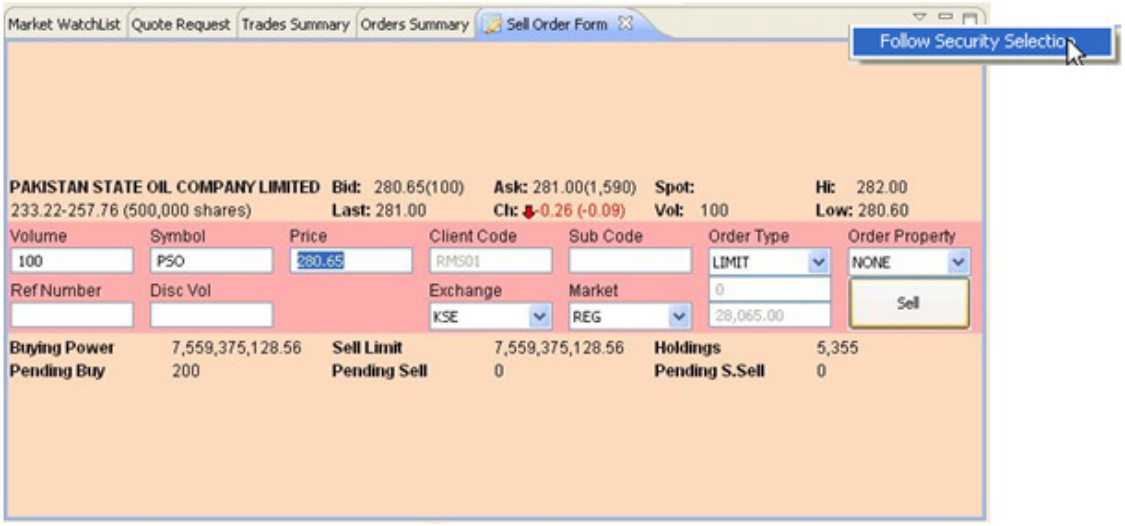


Figure 97: Sell Order Form

This is new functionality provided to the user. If this option markets than as user change the security, credential of the selected security will also be changed in Sell Order Form.

Screen Explanation

Checkbox or Field	Function
Volume	Give volume of the order
Symbol	Give symbol
Price	Give price for the symbol
Client Code	Give client code if trader is logged in. If client is logged in client code appears and is disabled.
Sub Code	Give sub code
Order Type	Give order type as LIMIT, STOP LOSS, MIT, S/L Market, Market or Short Sell
Order Property	Give order property as NONE or AON
Reference Number	Give reference number for the order
Disc Volume	Give disc volume
Exchange	Give exchange in which order is placed
Market	Give market whether REG, COT, FUT, PRV, ODL, NCCSF, NCDFUT

Order confirmation prompt appears.

Trading Menu – Sell Order Form

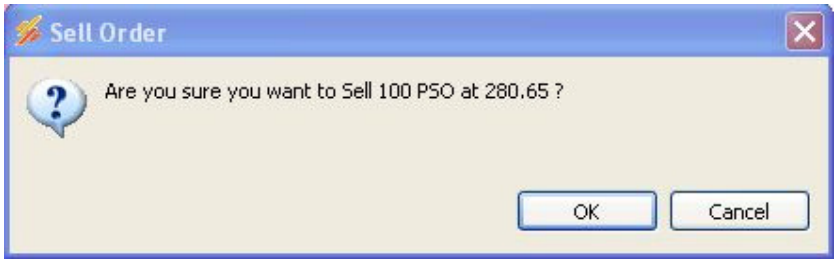


Figure 98: Order Confirmation Prompt

Press OK button to place sell order.

Following appears when the sell order has been successfully placed.

Notification
Trade Confirmation
Remarks : 12:54:24: TRADE 7140. Sold 100 PSO in KSE at 281.0 for RMS01 order 9563 reference null remaining 0
Trade Confirmation
Remarks : 12:54:24: TRADE 7140. Bought 100 PSO in KSE at 281.0 for RMS01 order 9562 reference null remaining 0
Order Confirmation
Remarks : 12:54:23: SELL 100 PSO in KSE at 280.65 for RMS01 order 9563
Order Confirmation
Remarks : 12:54:23: New SELL order of 100 PSO in KSE at 280.65 for RMS01 is received.

Figure 99: Order Confirmation Prompt

In the figure 77, Trade Confirmation message appears along with Order confirmation. Trade Confirmation message shows that a trade has been executed.

2.1.7 Trading Menu – Short Sell Order Form

Navigation:

Trading >Short Sell Order or F8 (shortcut)

KASB DIRECT User has provided with the option of Short Sell Order form to place a short sell order.F8 Short Key used to display Short Shell form or user can access through **Trading Menu>>Short Sell.**

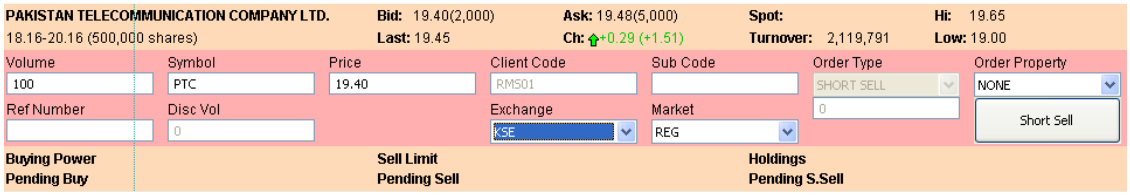


Figure 100: Short Sell

This is new functionality provided to the user. If this option market than as user change the security, credential of the selected security will also be changed in short Sell Form.

Checkbox or Field	Function
Volume	Give volume of the order
Symbol	Give symbol
Price	Give price for the symbol
Client Code	Give client code if trader is logged in. If client is logged in client code appears and is disabled.
Sub Code	Give sub code
Order Type	Give order type as LIMIT, STOP LOSS, MIT, S/L Market, Market or Short Sell
Order Property	Give order property as NONE or AON
Reference Number	Give reference number for the order
Disc Volume	Give disc volume
Exchange	Give exchange in which order is placed
Market	Give market whether REG, COT, FUT, PRV, ODL, NCCSF, NCDFUT

2.1.8 Trading Menu – Cancel Order

Navigation:

Trading > Cancel Order

Select the order from the orders view. Right click it and select cancel. You can also select cancel order from the Trading Menu after selecting order from the orders view.

Figure 101: Cancel Order

Order cancelation confirmation appears.

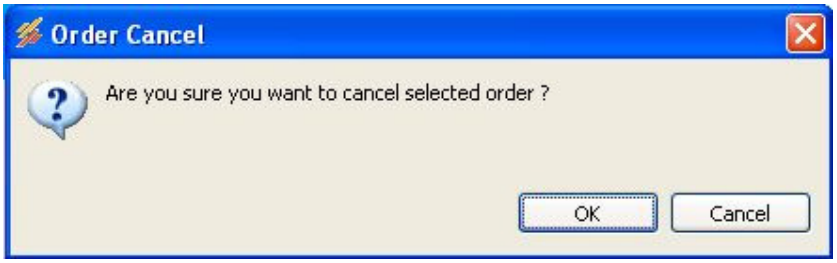


Figure102: Cancel Order Confirmation Prompt

Trading Menu –Cancel Order

Notification
Order Confirmation
Remarks : 13:53:51: Cancelled. BUY 200 PSO in KSE at 281.0 for RMS01 order 9565
Order Confirmation
Remarks : 13:53:51: Cancellation request of BUY of 200 PSO in KSE at 281.0 for RMS01 is received.

Figure103: Cancel Order Confirmation

If order cancellation of the order gets rejected due to any reason rejection message appears.

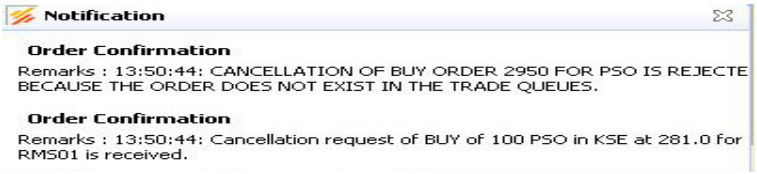

Notification
Order Confirmation
Remarks : 13:50:44: CANCELLATION OF BUY ORDER 2950 FOR PSO IS REJECTE BECAUSE THE ORDER DOES NOT EXIST IN THE TRADE QUEUES.
Order Confirmation
Remarks : 13:50:44: Cancellation request of BUY of 100 PSO in KSE at 281.0 for RMS01 is received.

Figure104: Cancel Order Confirmation(order not cancelled)

2.1.9 Trade Menu – Cash Withdrawal

Navigation:

Trading>Cash Withdrawal

It allows withdrawing cash and amount of the cash should not less than Rs.5, 000/-

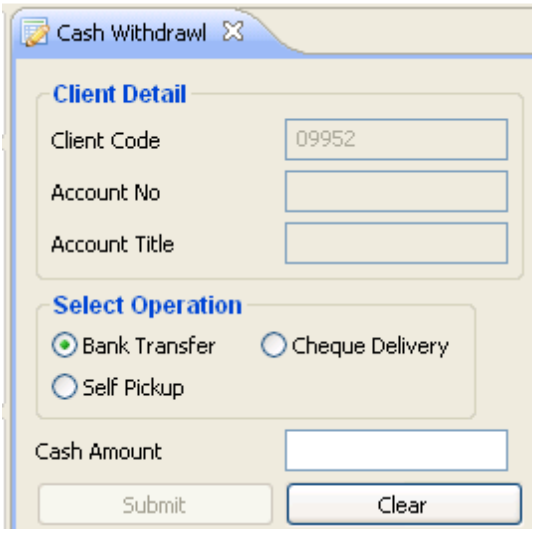


Figure105: Cash Withdrawal

Screen Explanation

Combo Box or Field	Function
Client Code	Give client code. If client is logged in client code is automatically selected and this field is disabled.
Account Number	Auto Populated
Account Title	Auto Populated
Select Operation	Select any operation as required
Cash Amount	Enter the amount of Cash

2.1.10Trade Menu – Margin Detail View

Navigation:

Trading > Margin Detail View

In Margin Detail view you can view the margin details in the form of account summary, account liquidity and portfolio details.

Trade Menu – Margin Detail View

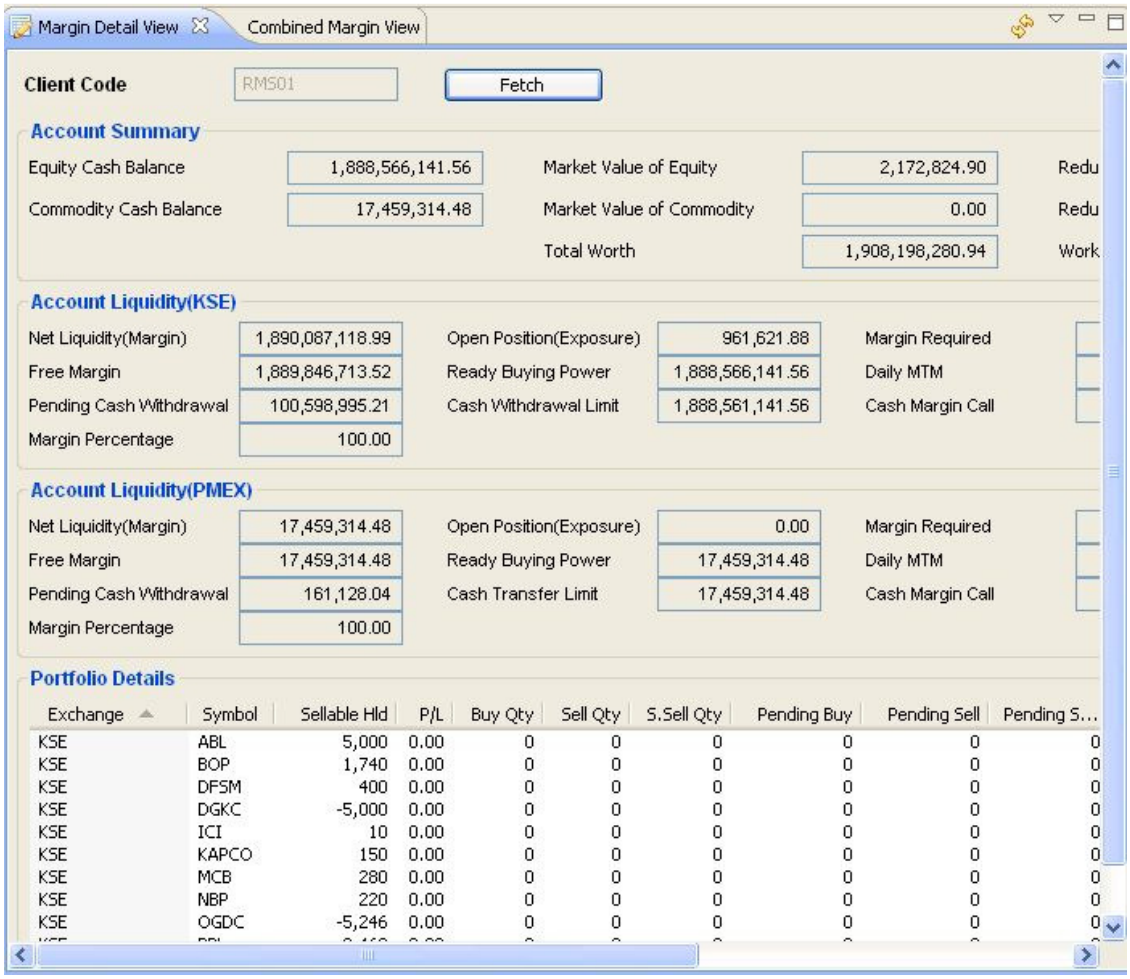


Figure106: Margin Detail View

Screen Explanation

Field	Function
Client	Give the client code in case trader or admin is logged in. In case of client code is automatically picked and this field is disabled

3 Reports

3.1 Reports Menu

3.1.1 Reports Menu – Cash Book

Navigation:

Reports >Cash Book

Cash Book report displays the ledger in the form of trade voucher date, trade voucher number, Settlement Date, Trade Date, debit, credit, and current balance. In the end grand total of balance is displayed.

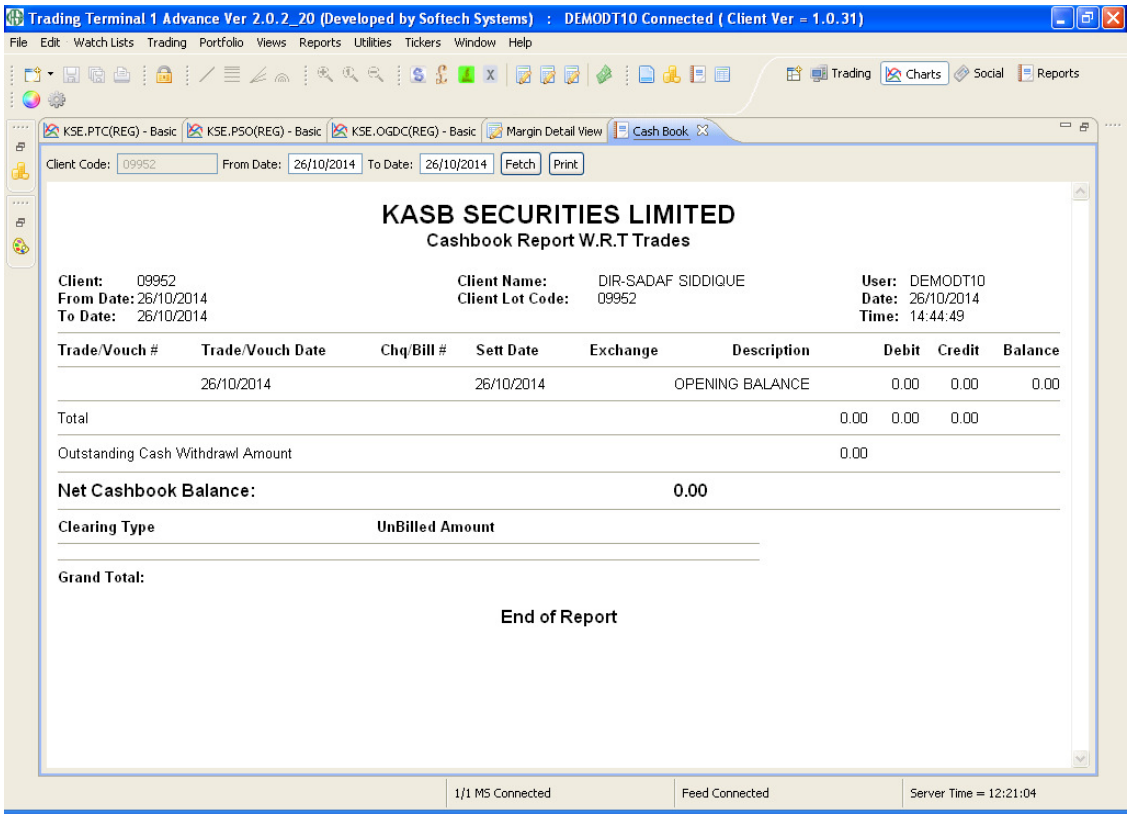

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
KSE.PTC(REG) - Basic KSE.PSO(REG) - Basic KSE.OGDC(REG) - Basic Margin Detail View Cash Book
Client Code: 09952 From Date: 26/10/2014 To Date: 26/10/2014 Fetch Print
KASB SECURITIES LIMITED
Cashbook Report W.R.T Trades
Client: 09952
From Date: 26/10/2014
To Date: 26/10/2014
Client Name: DIR-SADAF SIDDIQUE
Client Lot Code: 09952
User: DEMODT10
Date: 26/10/2014
Time: 14:44:49
Trade/Vouch # Trade/Vouch Date Chq/Bill # Sett Date Exchange Description Debit Credit Balance
26/10/2014 26/10/2014 OPENING BALANCE 0.00 0.00 0.00
Total 0.00 0.00 0.00
Outstanding Cash Withdrawl Amount 0.00
Net Cashbook Balance: 0.00
Clearing Type UnBilled Amount
Grand Total:
End of Report
1/1 MS Connected
Feed Connected
Server Time = 12:21:04

Figure107: Cash Book Report

Screen Explanation

Field	Function
Client Code	Give the client code in case trader or admin is logged in. In case of client code is automatically filled and this field is disabled
From Date	Narrows down the ledger search. Ledger with trade/vouch date after this

	date is displayed
To Date	Narrow down the ledger search. Ledger with trade/vouch date before this date is displayed

3.1.2 Reports Menu – Customer Payment

Navigation:

Reports > Customer Payment

Customer Payment Requests report displays status of customer payment request(s).

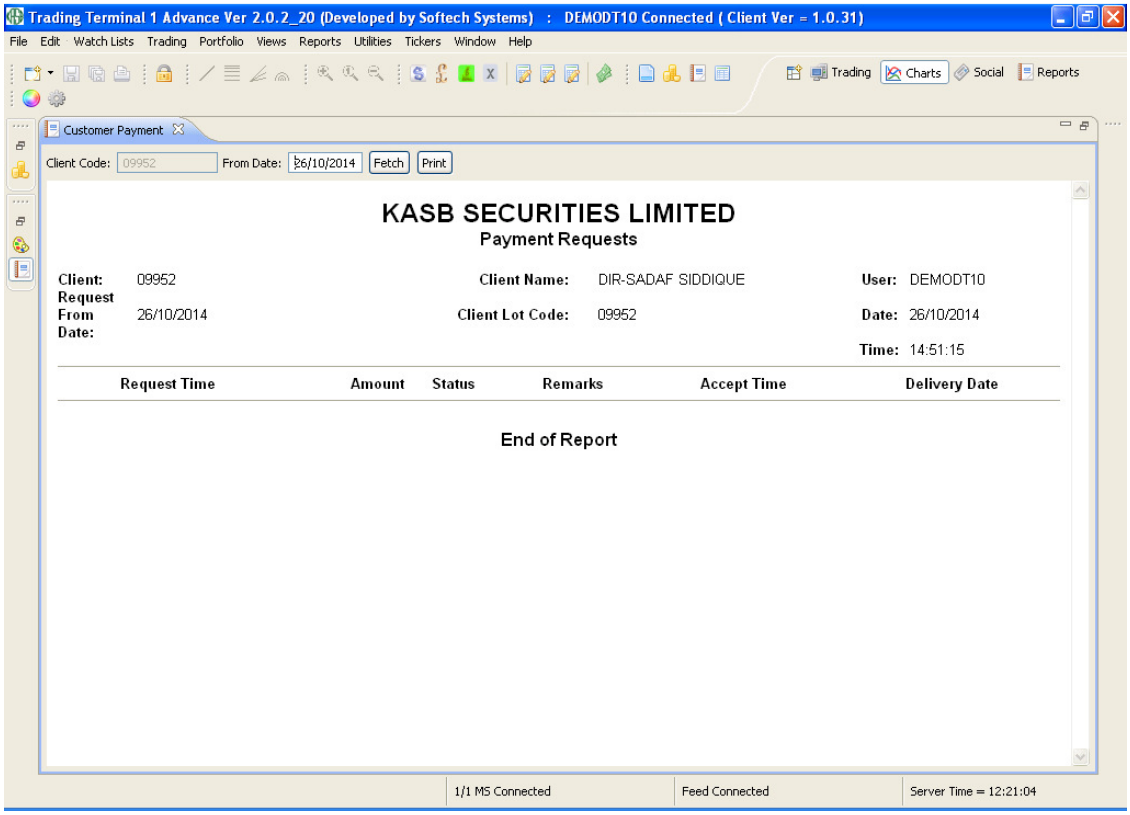

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Customer Payment
Client Code: 09952 From Date: 26/10/2014 Fetch Print
KASB SECURITIES LIMITED
Payment Requests
Client: 09952
Client Name: DIR-SADAF SIDDIQUE
User: DEMODT10
Request From Date: 26/10/2014
Client Lot Code: 09952
Date: 26/10/2014
Time: 14:51:15
Request Time Amount Status Remarks Accept Time Delivery Date
End of Report
1/1 MS Connected
Feed Connected
Server Time = 12:21:04

Figure108: Payment Requests Report

Screen Explanation

Field	Function
Client Code	Give the client code in case trader or admin is logged in. In case of client code is automatically filled and this field is disabled
From Date	Narrows down the search. Request(s) with request date after this date is/are displayed

3.1.3 Reports Menu – Net Share Custody

Navigation:

Reports > Net Share Custody

Net Share Custody report displays net custody share for any specified symbol.

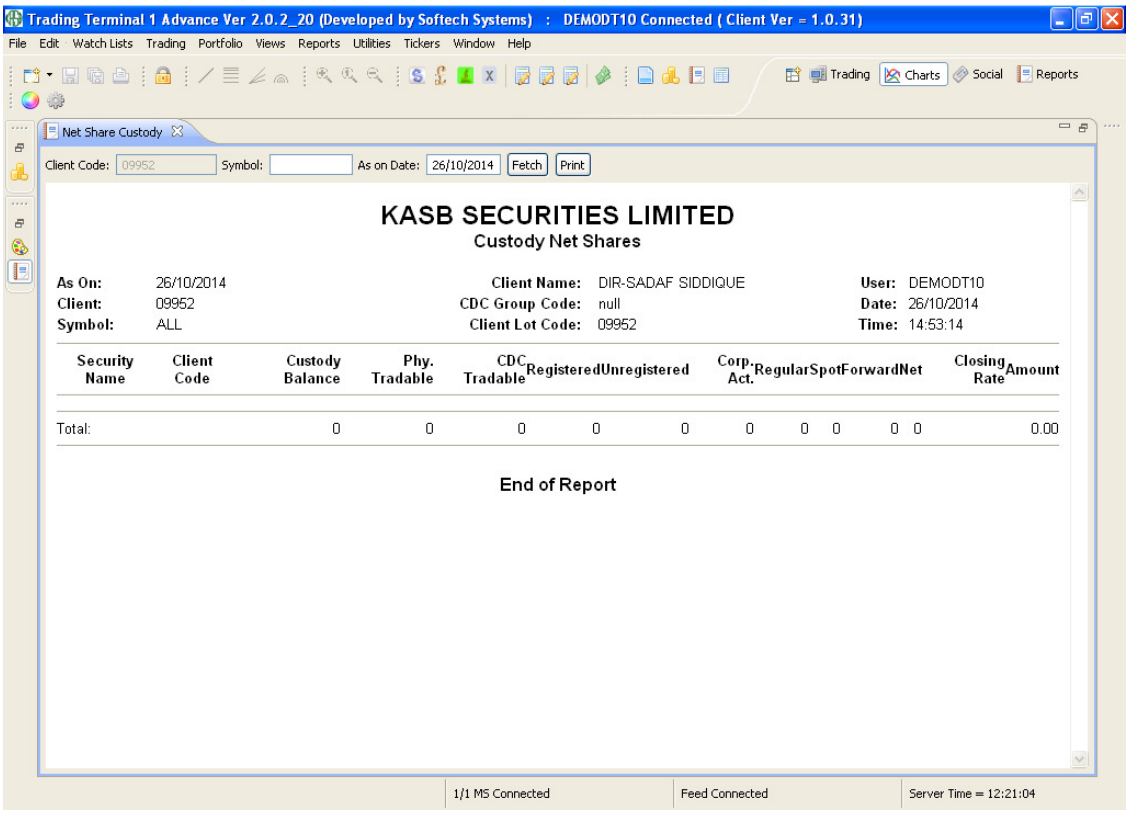


Figure109: Net Share Custody Report

Screen Explanation

Field	Function
Client Code	Give the client code in case trader or admin is logged in. In case of client code is automatically filled and this field is disabled
As on Date	Net share custody on this date is displayed
Symbol	Symbol whose net share custody is to be displayed

3.1.4 Reports Menu – Outstanding Orders

Navigation:

Reports > Outstanding Orders

Outstanding Orders report displays outstanding orders and their status.

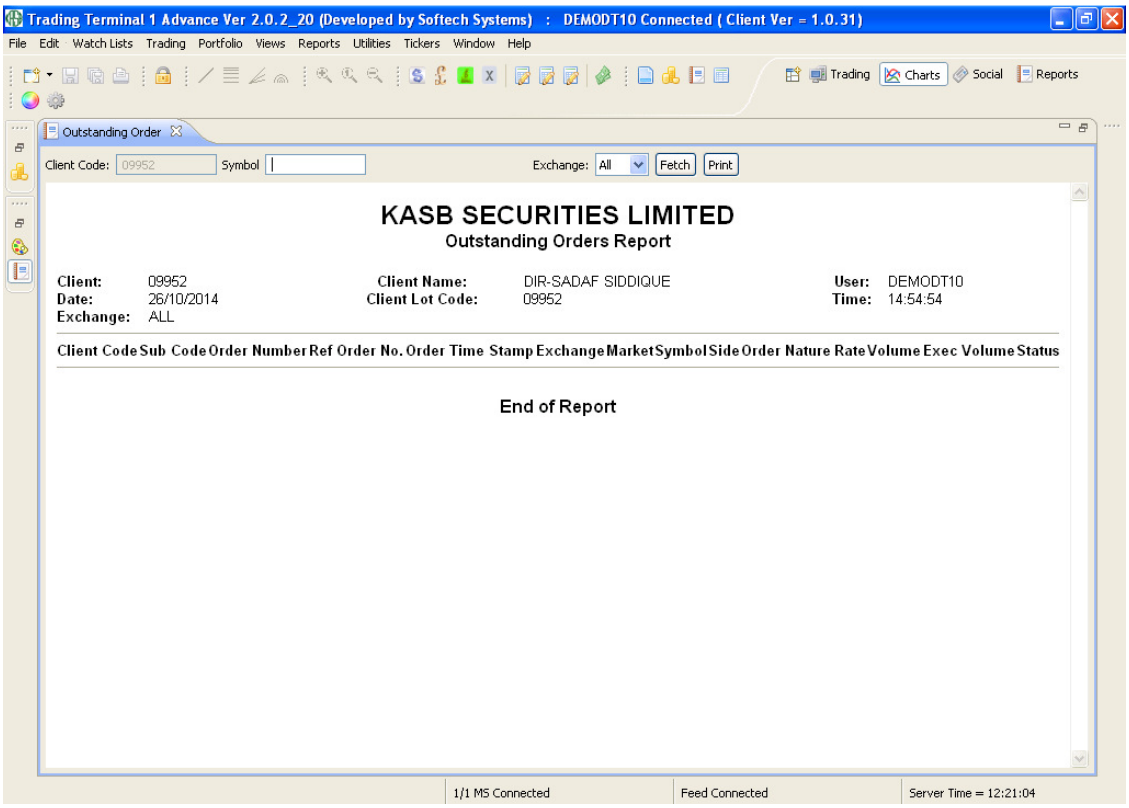

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Outstanding Order
Client Code: 09952 Symbol Exchange: All Fetch Print
KASB SECURITIES LIMITED
Outstanding Orders Report
Client: 09952 Client Name: DIR-SADAF SIDDIQUE User: DEMODT10
Date: 26/10/2014 Client Lot Code: 09952 Time: 14:54:54
Exchange: ALL
Client Code Sub Code Order Number Ref Order No. Order Time Stamp Exchange Market Symbol Side Order Nature Rate Volume Exec Volume Status
End of Report
1/1 MS Connected
Feed Connected
Server Time = 12:21:04

Figure110: Outstanding Orders Report

Screen Explanation

Field	Function
Client Code	Give the client code in case trader or admin is logged in. In case of client, client code is automatically filled and this field is disabled
Exchange	Select the exchange

3.1.5 Reports Menu – Periodic Summary

Navigation:

Reports > Periodic Summary

Periodic Trade Summary shows symbol wise summary of client's trades in a particular period of time. Report can be requested for a particular period of time and for a particular clearing type. It shows the summary of client's trades in all symbols.

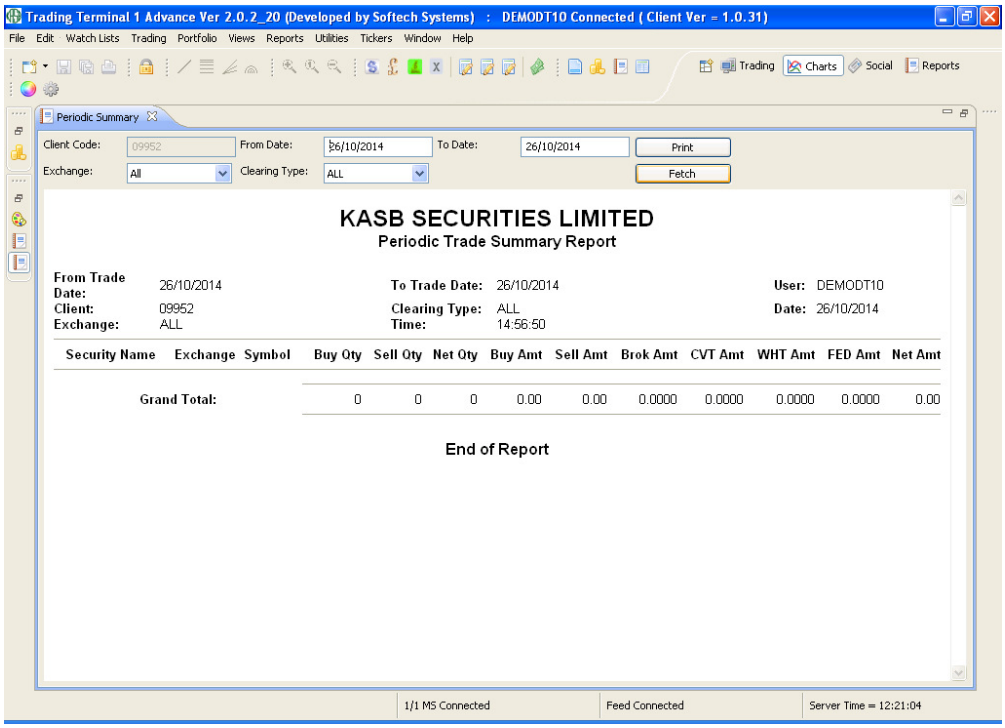

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Periodic Summary
Client Code: 09952
From Date: 26/10/2014
To Date: 26/10/2014
Print
Exchange: All
Clearing Type: ALL
Fetch
KASB SECURITIES LIMITED
Periodic Trade Summary Report
From Trade Date: 26/10/2014
To Trade Date: 26/10/2014
User: DEMODT10
Client: 09952
Clearing Type: ALL
Date: 26/10/2014
Exchange: ALL
Time: 14:56:50
Security Name Exchange Symbol Buy Qty Sell Qty Net Qty Buy Amt Sell Amt Brok Amt CVT Amt WHT Amt FED Amt Net Amt
Grand Total: 0 0 0 0.00 0.00 0.0000 0.0000 0.0000 0.0000 0.00
End of Report
1/1 MS Connected
Feed Connected
Server Time = 12:21:04

Figure111: Periodic Summary Report

Screen Explanation

Field	Function
Client Code	Give the client code in case trader or admin is logged in. In case of client code is automatically filled and this field is disabled
From Date	Select starting date
To Date	Select ending date
Exchange	Select exchange
Clearing Type	Select clearing type

3.1.6 Reports Menu – Periodic Detail

Navigation:

Reports > Periodic Detail

Periodic Details report displays periodic details for a particular symbol.

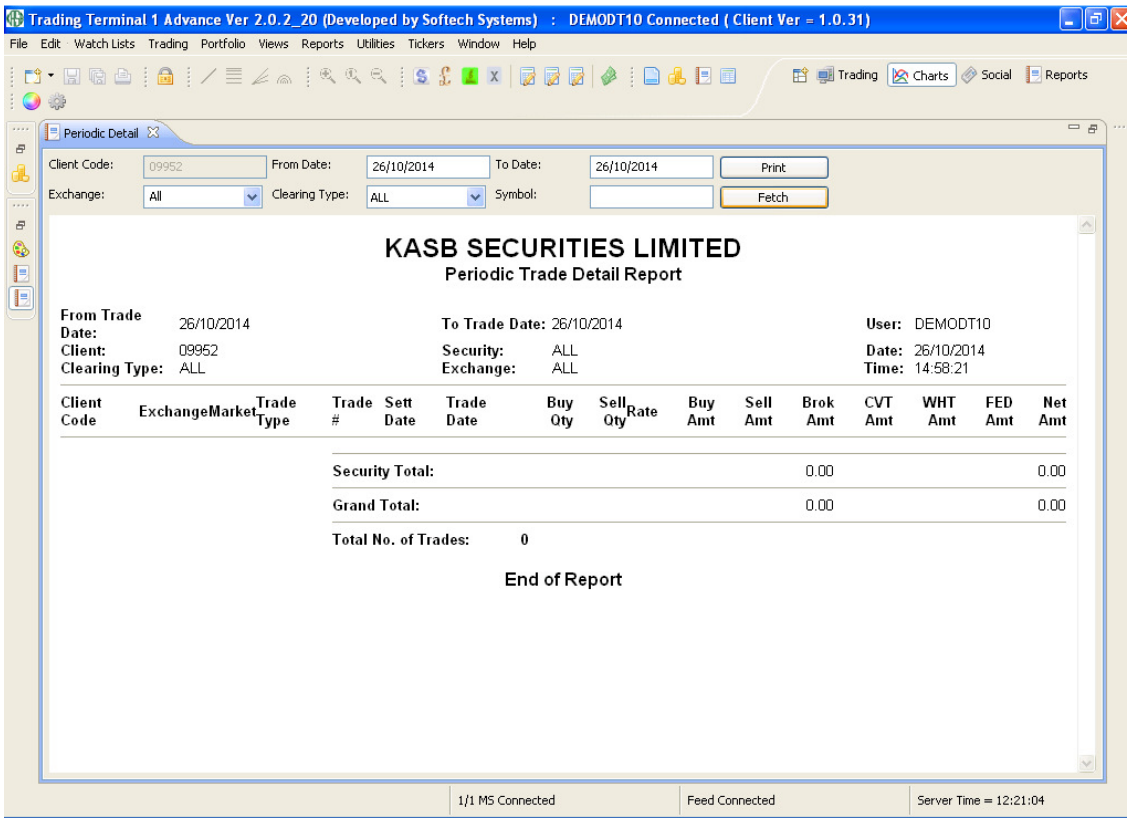

Trading Terminal 1 Advance Ver 2.0.2_20 (Developed by Softech Systems) : DEMODT10 Connected (Client Ver = 1.0.31)
File Edit Watch Lists Trading Portfolio Views Reports Utilities Tickers Window Help
Trading Charts Social Reports
Periodic Detail
Client Code: 09952
From Date: 26/10/2014
To Date: 26/10/2014
Print
Exchange: All
Clearing Type: ALL
Symbol:
Fetch
KASB SECURITIES LIMITED
Periodic Trade Detail Report
From Trade Date: 26/10/2014
To Trade Date: 26/10/2014
User: DEMODT10
Client: 09952
Security: ALL
Date: 26/10/2014
Clearing Type: ALL
Exchange: ALL
Time: 14:58:21
Client Code Exchange Market Trade Type Trade # Sett Date Trade Date Buy Qty Sell Qty Rate Buy Amt Sell Amt Brok Amt CVT Amt WHT Amt FED Amt Net Amt
Security Total: 0.00 0.00
Grand Total: 0.00 0.00
Total No. of Trades: 0
End of Report
1/1 MS Connected
Feed Connected
Server Time = 12:21:04

Figure112: Periodic Detail Report

Screen Explanation

Field	Function
Client Code	Give the client code in case trader or admin is logged in. In case of client code is automatically filled and this field is disabled
From Date	Select starting date
To Date	Select ending date
Exchange	Select exchange
Clearing Type	Select clearing type
Symbol	Give a symbol for which periodic detail is to be displayed

4.1 Short Keys List

Field	Function
Orders	Ctrl + O
Order Summary	Ctrl + Shift + O
Trades	Ctrl + R
Trades Summary	Ctrl + Shift + R
Buy Order	F4
Sell Order	F5
Short Sell Order	F8
Cancel Order	F11
Margin Detail View	Ctrl + M
Log Out	Ctrl + Shift + L
Lock Application	Ctrl + L
Close	Ctrl + W
Close All	Ctrl + Shift + W
Exit	Ctrl + Q
Change Password	Ctrl + Shift + P
Change Pin Code	Ctrl + Alt + P
Symbol List	F3
Message Board	Ctrl + E
Web Browser	Ctrl + T

Figure 113: Short Keys